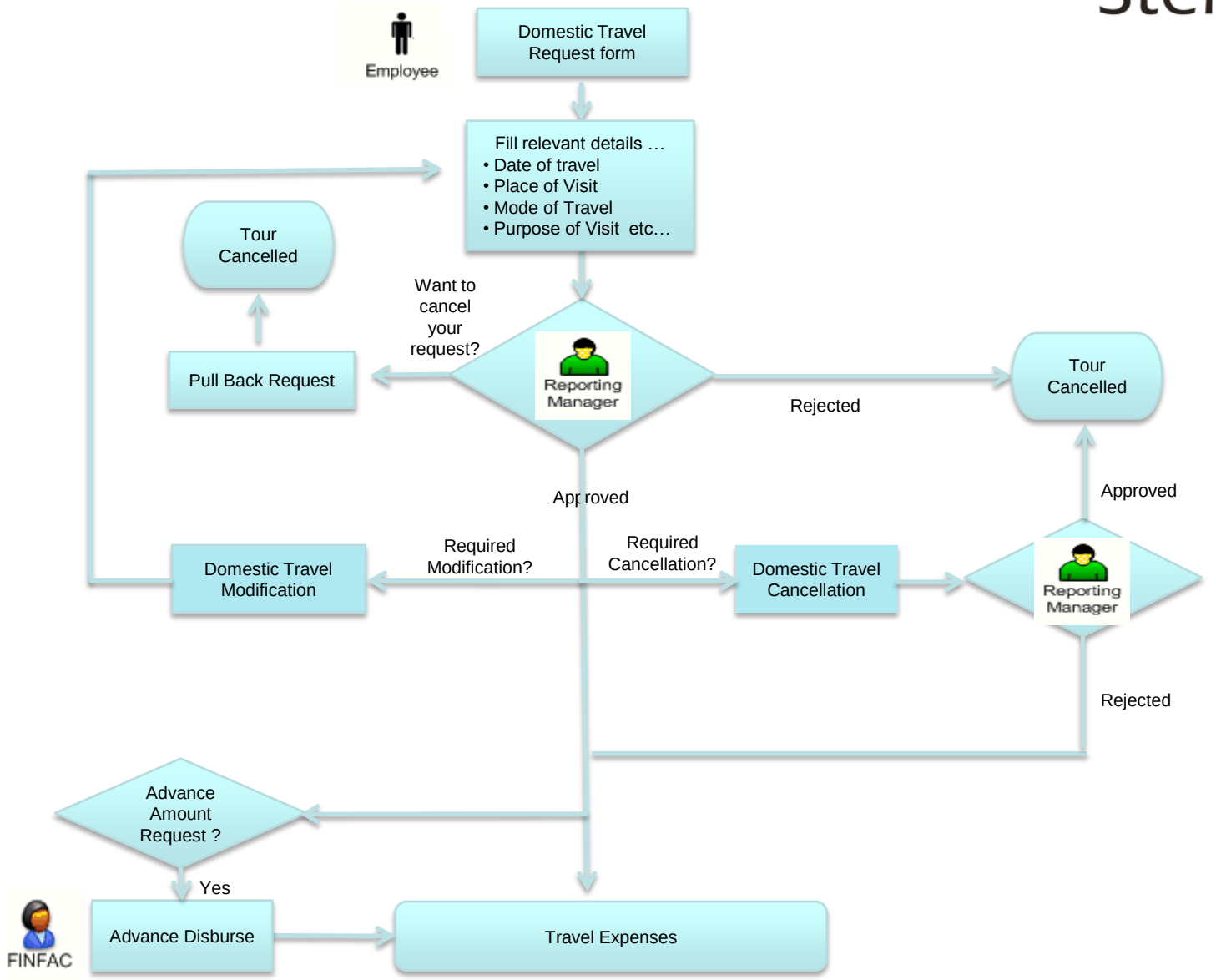
Travel Management In Adrenalin ESS Portal

User Manual

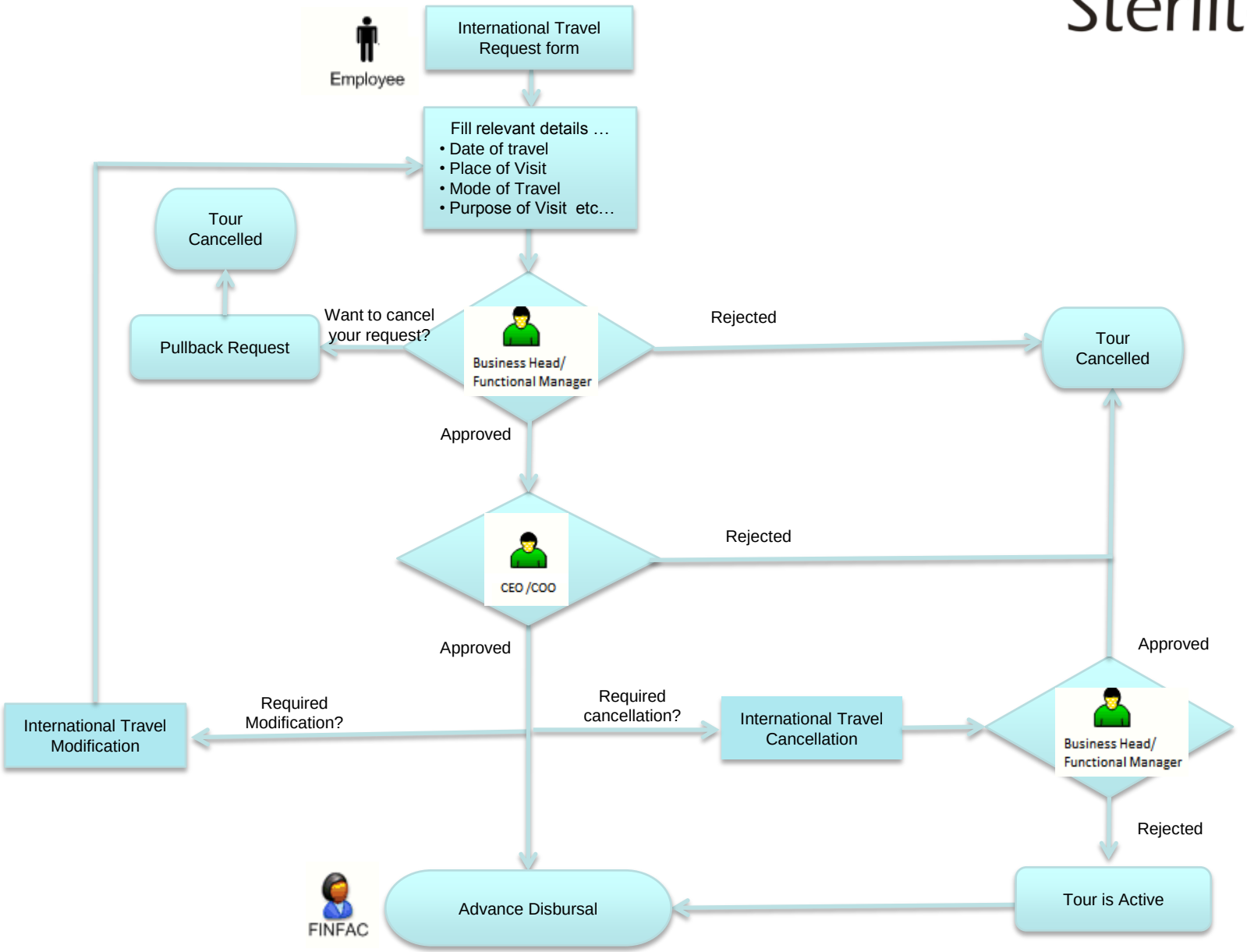
Contents:

1. Domestic Travel Request - Workflow
2. International Travel Request - Workflow
3. Travel Expenses Approval – Workflow
4. Travel Management Application View
5. Domestic Travel Request
6. Travel Request Pullback
7. Travel Request Approval by Manager
8. Travel Request Approval - Status Checking
9. Domestic Travel Advance Request
10. Domestic Travel Advance Request – Status Checking
11. Domestic Travel Advance Cancellation
12. Domestic Travel Advance Cancellation – Status Checking
13. Domestic Travel Request Modification
14. Domestic Travel Request Modification – Status Checking
15. Domestic Travel Cancellation
16. Domestic Travel Cancellation - Status Checking
17. International Travel Request
18. International Travel Modification
19. International Travel Cancellation
20. Tour Expenses submission
21. Expenses approval by Manager
22. Expenses Form Approval - Status Checking
23. Print – Expenses Form
24. Important Points

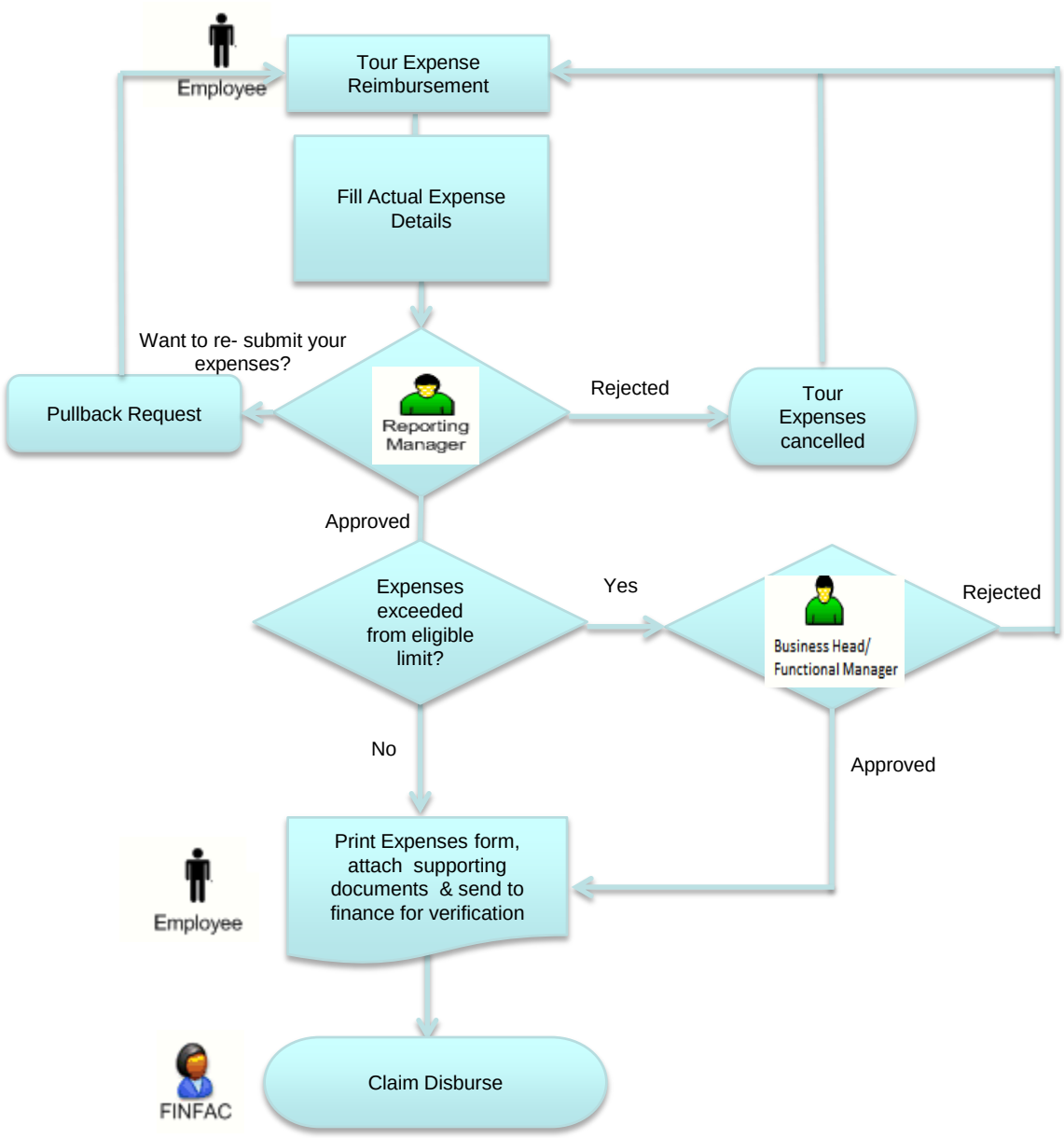
Domestic Travel Request - Workflow



International Travel Request - Workflow

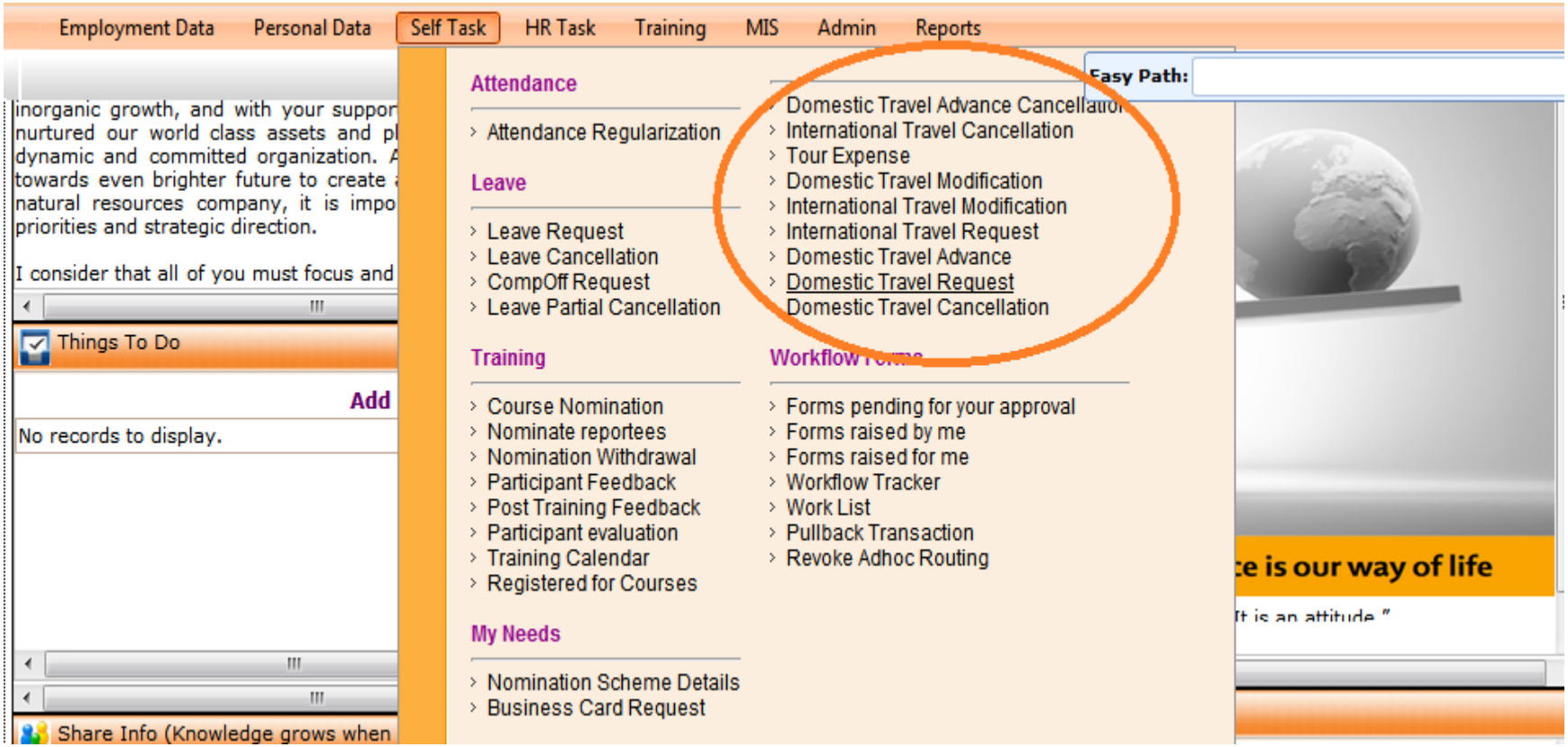


Travel Expenses Approval - Workflow



Travel Management Application View

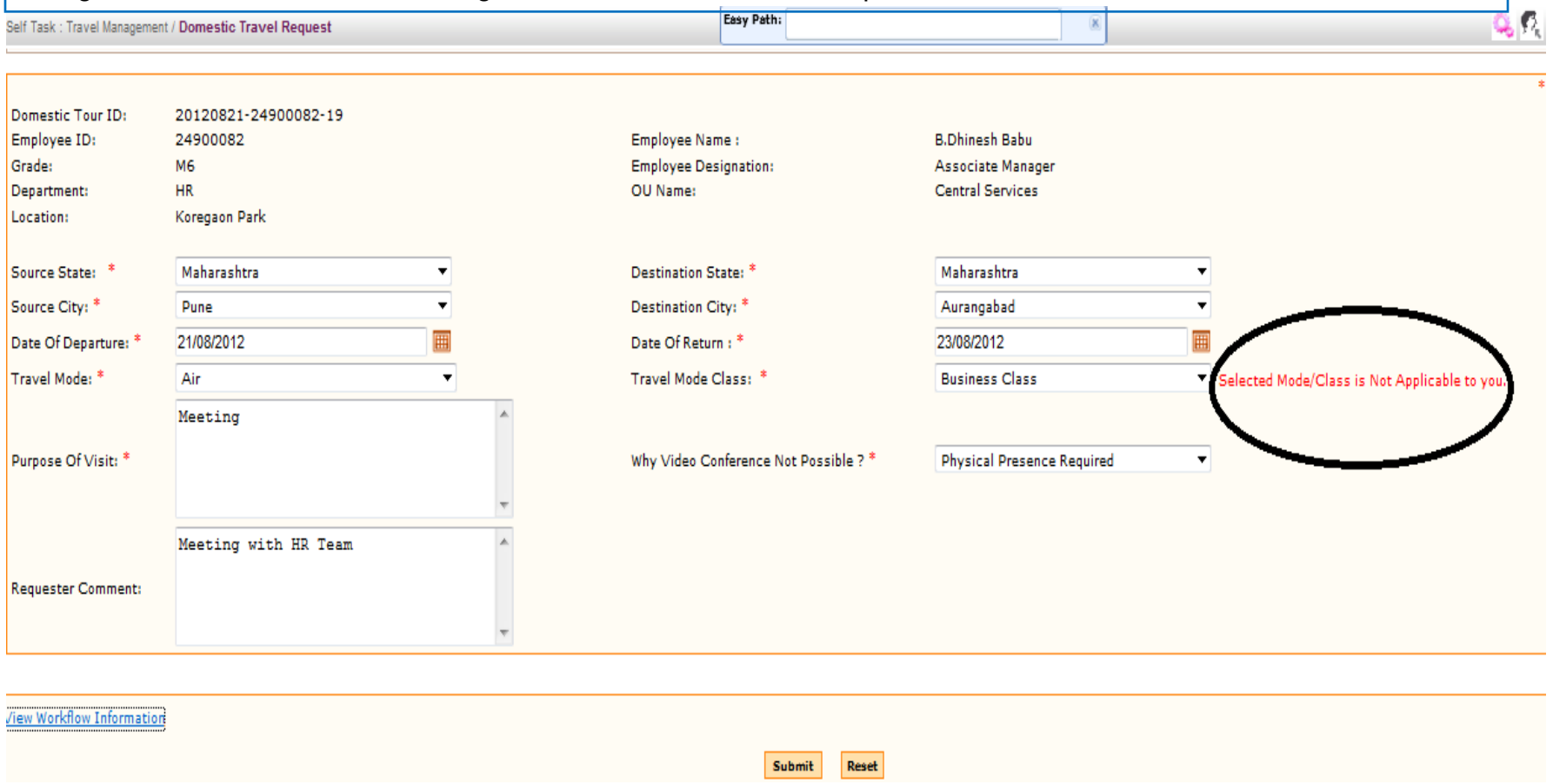
Navigation: Logon in Adrenalin and point to Self Task→ Travel Management



Note:
1. This form is viewable and accessible to Sterlite employees only
2. Domestic Travel – Travel within a country from where you are located
3. International Travel – Travel to other countries from where you located

Domestic Travel Request

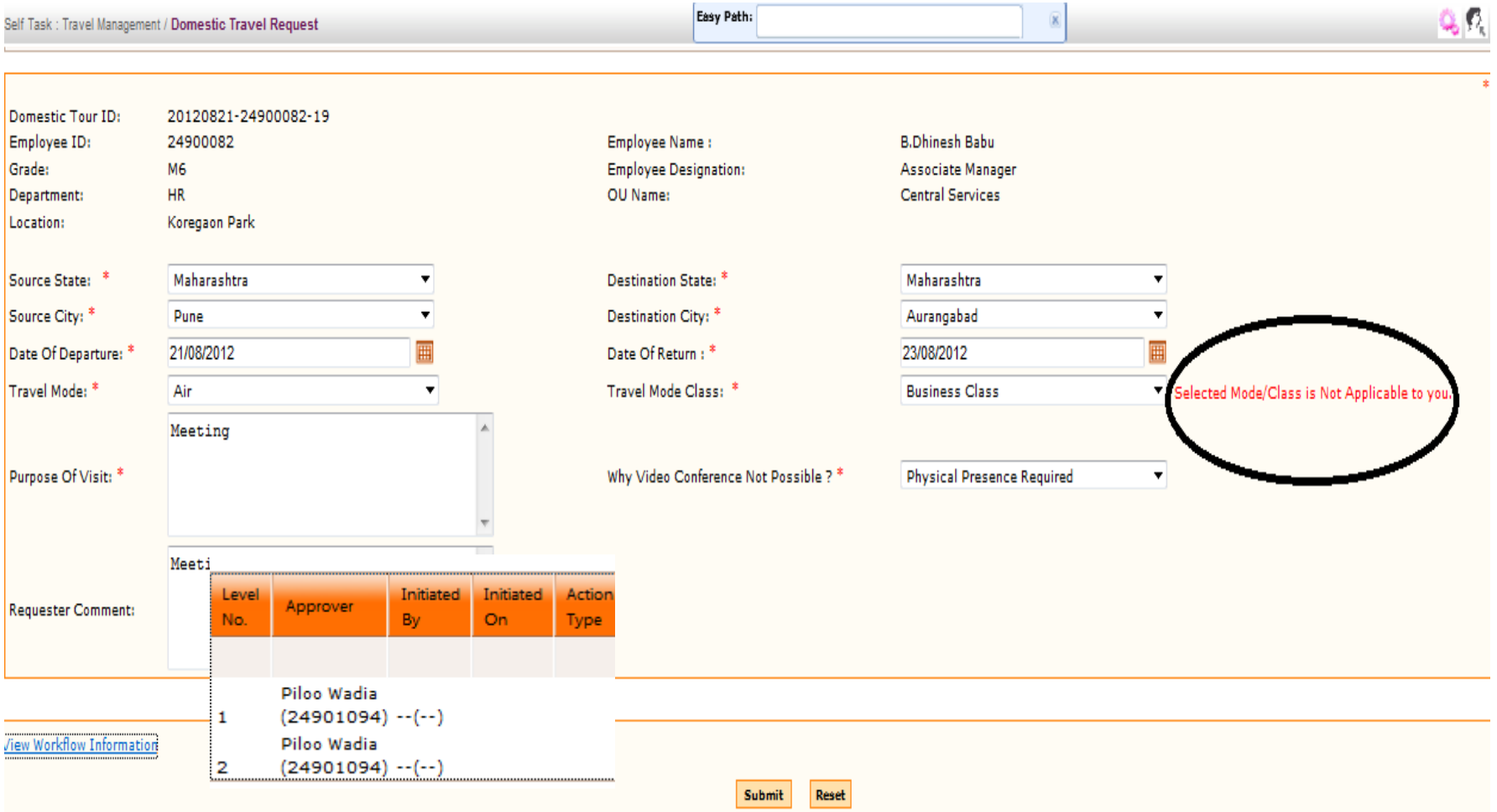
Navigation: Self Task→ Travel Management → Domestic Travel Request


Self Task : Travel Management / Domestic Travel Request
Easy Path:
Domestic Tour ID: 20120821-24900082-19
Employee ID: 24900082
Grade: M6
Department: HR
Location: Koregaon Park
Employee Name : B.Dhinesh Babu
Employee Designation: Associate Manager
OU Name: Central Services
Source State: * Maharashtra
Source City: * Pune
Date Of Departure: * 21/08/2012
Travel Mode: * Air
Purpose Of Visit: * Meeting
Requester Comment: Meeting with HR Team
Destination State: * Maharashtra
Destination City: * Aurangabad
Date Of Return : * 23/08/2012
Travel Mode Class: * Business Class
Selected Mode/Class is Not Applicable to you.
Why Video Conference Not Possible ? * Physical Presence Required
View Workflow Information
Submit
Reset

Note:

1. Upon form selection, tour ID, Name, Code, Grade, Dept., Designation, Location & Business populated automatically
2. Select source state, destination state, city, date of travel, travel mode and travel class
3. An alert message appears, incase your travel class entitlement is not as per policy
4. Fill all relevant details. Fields marked as * are mandatory

Domestic Travel Request – Cont'd…

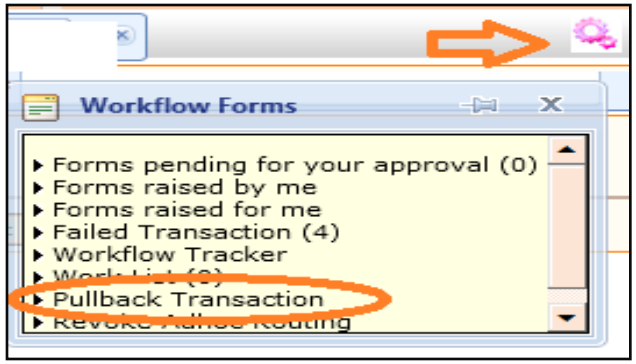

Self Task : Travel Management / Domestic Travel Request
Easy Path:
Domestic Tour ID: 20120821-24900082-19
Employee ID: 24900082
Grade: M6
Department: HR
Location: Koregaon Park
Employee Name : B.Dhinesh Babu
Employee Designation: Associate Manager
OU Name: Central Services
Source State: * Maharashtra
Source City: * Pune
Date Of Departure: * 21/08/2012
Travel Mode: * Air
Destination State: * Maharashtra
Destination City: * Aurangabad
Date Of Return : * 23/08/2012
Travel Mode Class: * Business Class
Selected Mode/Class is Not Applicable to you.
Purpose Of Visit: * Meeting
Why Video Conference Not Possible ? * Physical Presence Required
Requester Comment: Meeti
Level No. | Approver | Initiated By | Initiated On | Action Type
1 Piloo Wadia (24901094) --(--)
2 Piloo Wadia (24901094) --(--)
View Workflow Information
Submit
Reset

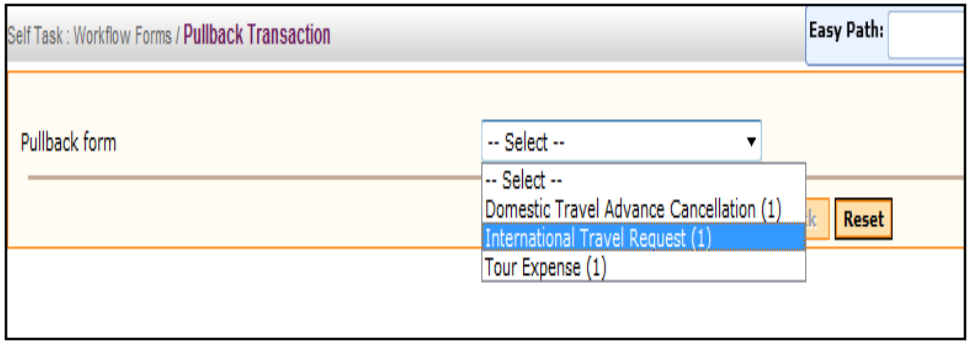
Note:

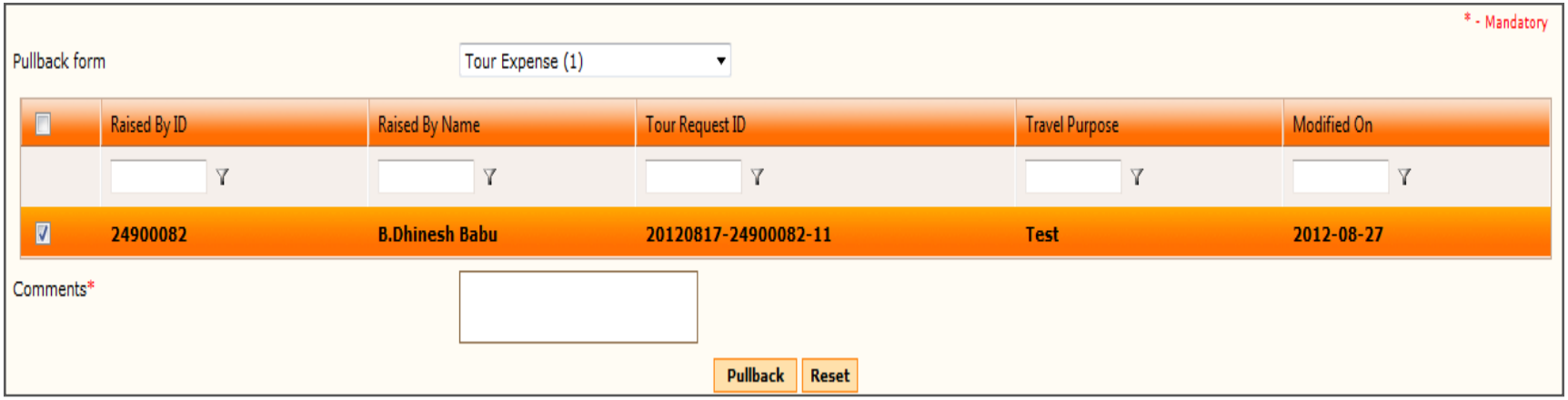
1. Click **"Work flow information"** to view your approver name
2. Click **"Submit"** to forward your request. Click **"Reset"** to refresh form
3. Upon submission, an auto mail triggered to approving authorities as per workflow configuration

Pullback Request

Navigation: Workflow forms→ Pullback Transaction / Self Task→ Pullback Transaction



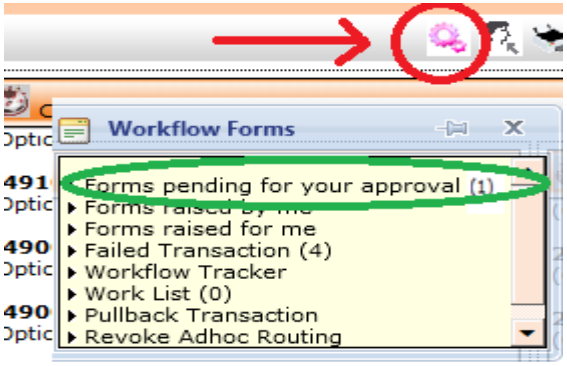




Note:
1. Any application can be pulled back before it gets approved by approving authority
2. Select application from the drop down list
3. Enter reason for pullback in comment box
4. Click **"pullback "** to cancel your application, Click "**reset"** to refresh form

Domestic Travel Approval

Navigation: Workflow forms→ Form Pending for approval / Self Task forms pending for approval



Pending Form Names: Domestic Travel Request (1)

Raised By ID	Raised By Name	Tour Request ID	Travel Purpose	Modified On	Raised On
24900082	B.Dhinesh Babu	20120821-24900082-19	Test	21-Aug-2012 16:03:25:687	21-Aug-2012 16:03

Comments*

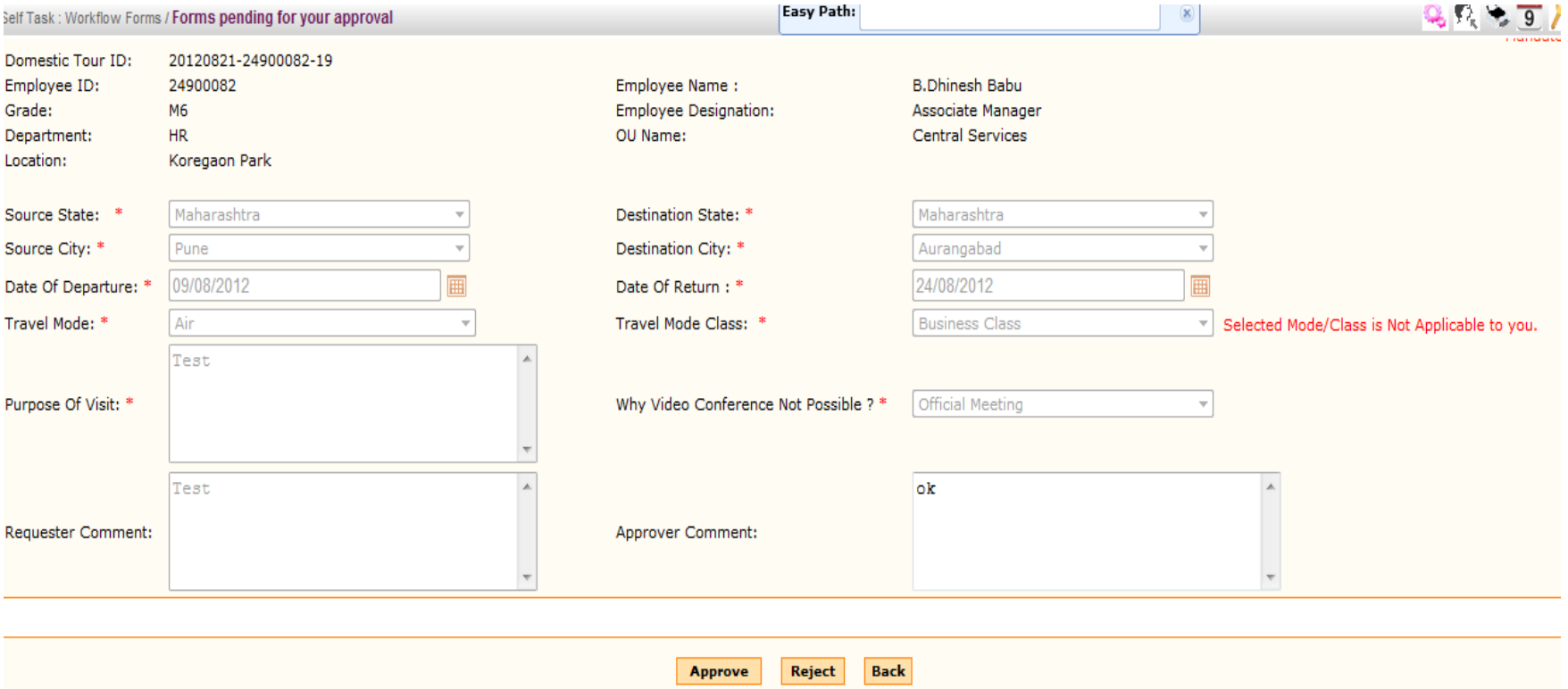
Approve | Reject | Reset

Note:

1. Only the approvers who have been configured in the workflow will be able to approve the travel requests that are raised by the initiator
2. Approver may click on the link which is enclosed on mail notification and logon directly to the application page
3. Select '**Forms pending for your approval**' from the Workflow forms popup window, and select '**Domestic Travel Request**' from the Pending Forms List
4. On selecting the form name, the list of requests that are waiting for approval will be open as shown above.
5. Choose a record to approve / reject
6. Double click on the record will open the request details as shown in next slide

Domestic Travel Approval – Cont'd…

Navigation: Self Task/ Workflow forms→ Form Pending for approval

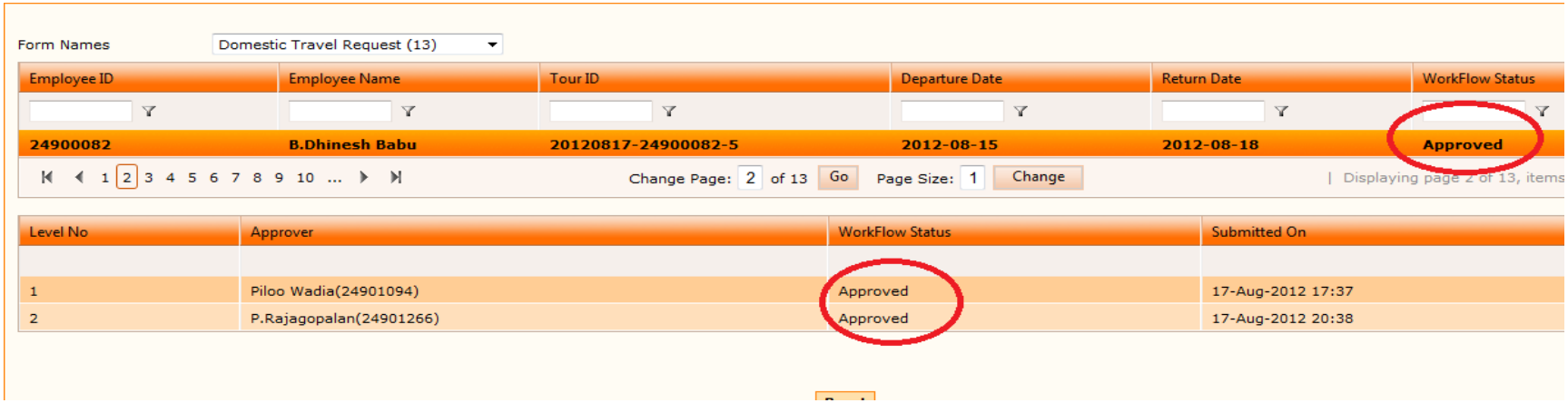

Self Task : Workflow Forms / Forms pending for your approval
Easy Path:
Domestic Tour ID: 20120821-24900082-19
Employee ID: 24900082
Grade: M6
Department: HR
Location: Koregaon Park
Employee Name : B.Dhinesh Babu
Employee Designation: Associate Manager
OU Name: Central Services
Source State: * Maharashtra
Source City: * Pune
Date Of Departure: * 09/08/2012
Travel Mode: * Air
Destination State: * Maharashtra
Destination City: * Aurangabad
Date Of Return : * 24/08/2012
Travel Mode Class: * Business Class
Selected Mode/Class is Not Applicable to you.
Purpose Of Visit: * Test
Why Video Conference Not Possible ? * Official Meeting
Requester Comment: Test
Approver Comment: ok
Approve
Reject
Back

Note:

1. Enter Comments and click "**Approve"** to approve the Travel Request / Click "**Reject"** to reject the Travel Request
2. If there is a deviation in travel class with respect to travel policy, then the application forwarded to Business Head / Functional Head approval
3. An auto mail triggered to Requester as well as Approver upon approval / rejection of form

Travel Request – Approval Status Checking

Navigation: Workflow forms→ Form raised by me or Self Task → Domestic Travel Request

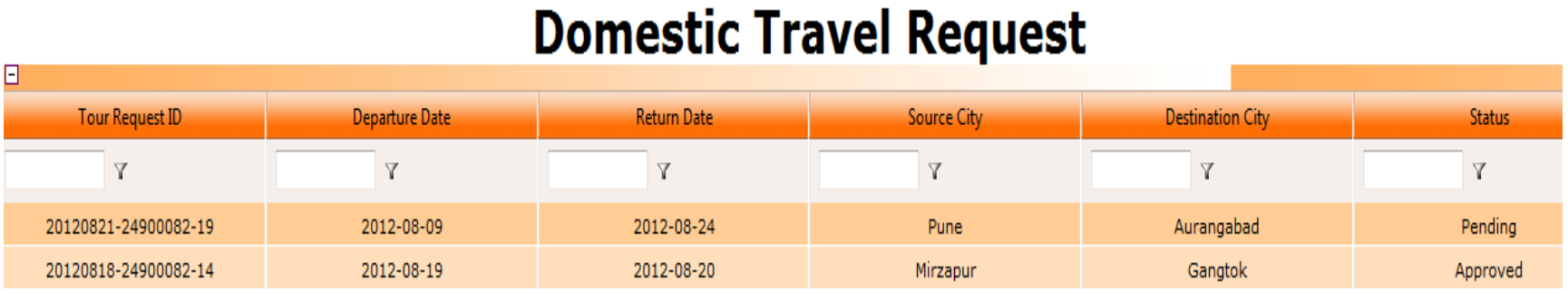


Form Names: Domestic Travel Request (13)

Employee ID	Employee Name	Tour ID	Departure Date	Return Date	WorkFlow Status
24900082	B.Dhinesh Babu	20120817-24900082-5	2012-08-15	2012-08-18	Approved

1 2 3 4 5 6 7 8 9 10 ... Change Page: 2 of 13 Go Page Size: 1 Change | Displaying page 2 of 13, items

Level No	Approver	WorkFlow Status	Submitted On
1	Piloo Wadia(24901094)	Approved	17-Aug-2012 17:37
2	P.Rajagopalan(24901266)	Approved	17-Aug-2012 20:38



Domestic Travel Request

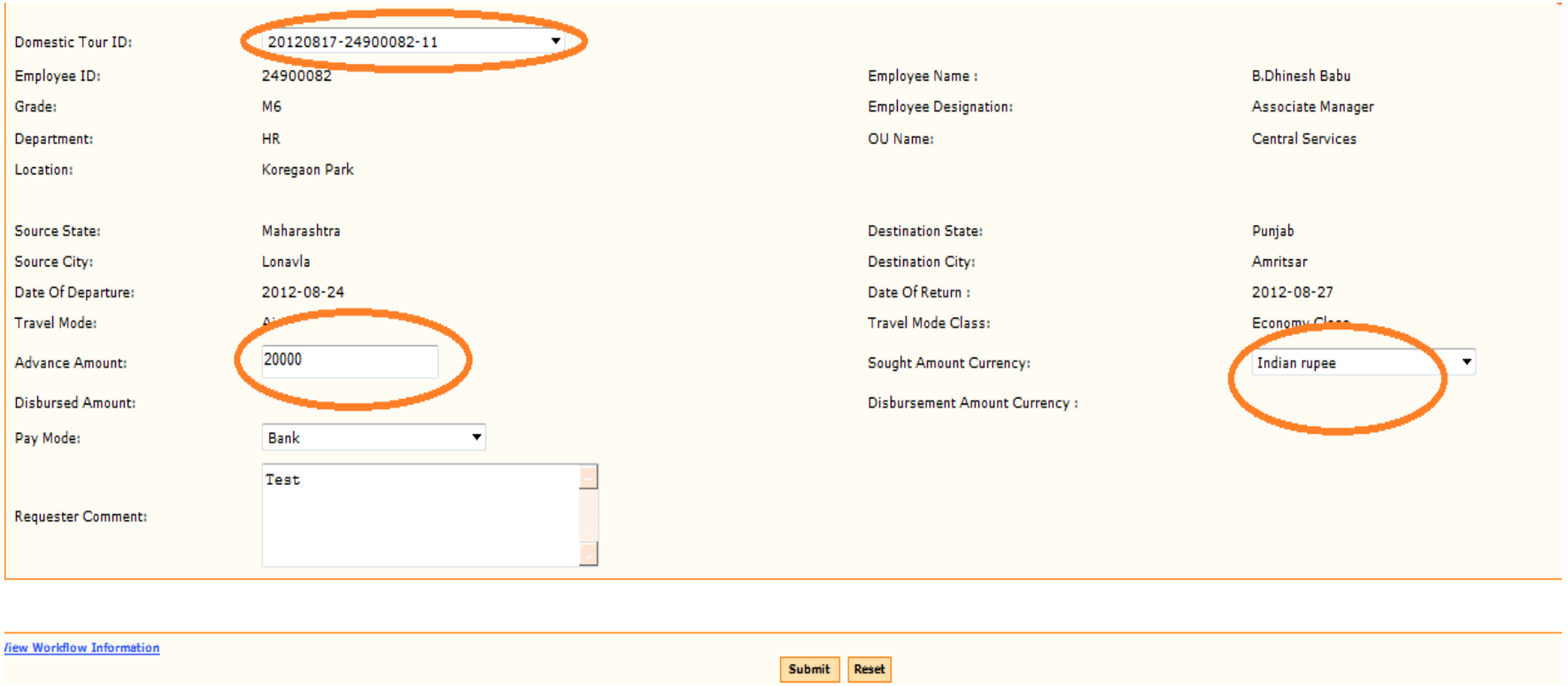
Tour Request ID	Departure Date	Return Date	Source City	Destination City	Status
20120821-24900082-19	2012-08-09	2012-08-24	Pune	Aurangabad	Pending
20120818-24900082-14	2012-08-19	2012-08-20	Mirzapur	Gangtok	Approved

Note:

1. Check status of the request from "**Forms raised by me"** / "**Domestic Travel Request"** from self Task
2. If Requester wish to withdraw the request before it gets approved from Reporting Manager, can do the same through **"Pullback Transaction**" from workflow forms, Self task.
3. All the approved travel requests will be shown in "Domestic Travel Advance Request", "Domestic Travel Cancellation" & "Domestic Travel Modification".

Domestic Travel Advance Request

Navigation: Self Task→ Travel Management→ Domestic Travel Advance



Note:

1. Select “Tour ID” from drop down list.
2. Enter **Advance Amount,** choose **“currency”** in which you want to have the Advance amount, Choose “**Pay mode”**
3. It is advisable to select pay mode as bank only, because amount above Rs. 5000 will be credited in bank account
4. Click “**Submit”** to forward the request & click “**Reset”** to refresh the form
5. An auto mail triggered to Finance Dept. upon submission of form
6. Mail notification comes to Requester upon advance amount disbursement by Finance

Travel Advance Disbursement Status

Navigation: Self Task→ Domestic Travel Advance

Domestic Travel Advance

Tour Request ID	Currency	Status	Amount	Disbursement
20120817-24900082-5	Indian rupee	Reject	20000	Not Disbursed.
20120817-24900082-11	Indian rupee	Approved	50000	Disbursed.
20120817-24900082-4	Indian rupee	Reject	20000	Not Disbursed.
20120818-24900082-13	Indian rupee	Approved	50000	Disbursed.
20120821-24900082-19	Indian rupee	Approved	100000	Disbursed.

1 2 Change Page: 1 of 2 Go Page Size: 5 Change | Displaying page 1 of 2 items 1 to 5

Navigation: Workflow forms→ forms raised by me

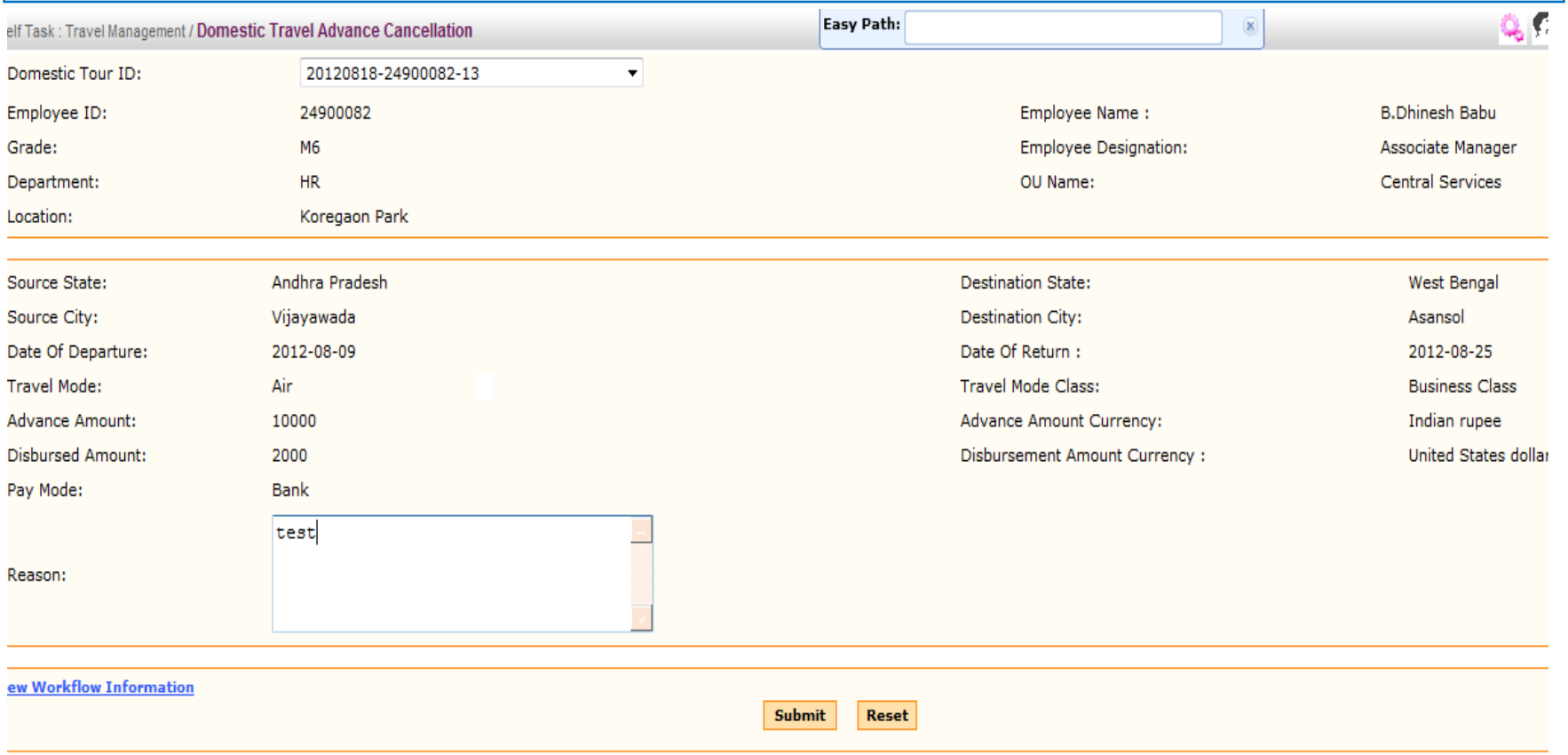
Form Names: Domestic Advance Request (9)

Employee ID	Employee Name	Tour ID	Amount	WorkFlow Status
24900082	B.Dhinesh Babu	20120818-24900082-14	50000	Approved
24900082	B.Dhinesh Babu	20120814-24900082-2	20	Approved
24900082	B.Dhinesh Babu	20120817-24900082-5	20000	Reject
24900082	B.Dhinesh Babu	20120817-24900082-11	50000	Approved
24900082	B.Dhinesh Babu	20120817-24900082-6	30000	Approved

Note:
1. Requester will get mail notification upon approval or rejection of form

Domestic Travel Advance Cancellation

Navigation: Self Task→ Travel Management→ Domestic Travel Advance Cancellation



Note:

1. Select “Tour ID” from drop down list.
2. Enter “**Reason**” for cancellation
3. Click “**Submit”** to forward the request & click “**Reset”** to refresh the form
4. An auto mail triggered to Finance Dept. upon submission of form

Domestic Travel Advance Cancellation – Status Checking …

Navigation: Self Task→ Domestic Travel Advance Cancellation

Domestic Travel Advance Cancellation

Tour Request ID	Departure Date	Return Date	Source City	Destination City	Status
20120818-24900082-14	2012-08-19	2012-08-20	Sikkim	Gangtok	Reject
20120818-24900082-13	2012-08-09	2012-08-25	West Bengal	Asansol	Pending

omestic Tour ID: --Select--

Navigation: Workflow forms→ forms raised by me

Form Names: Domestic Travel Cacellation (2)

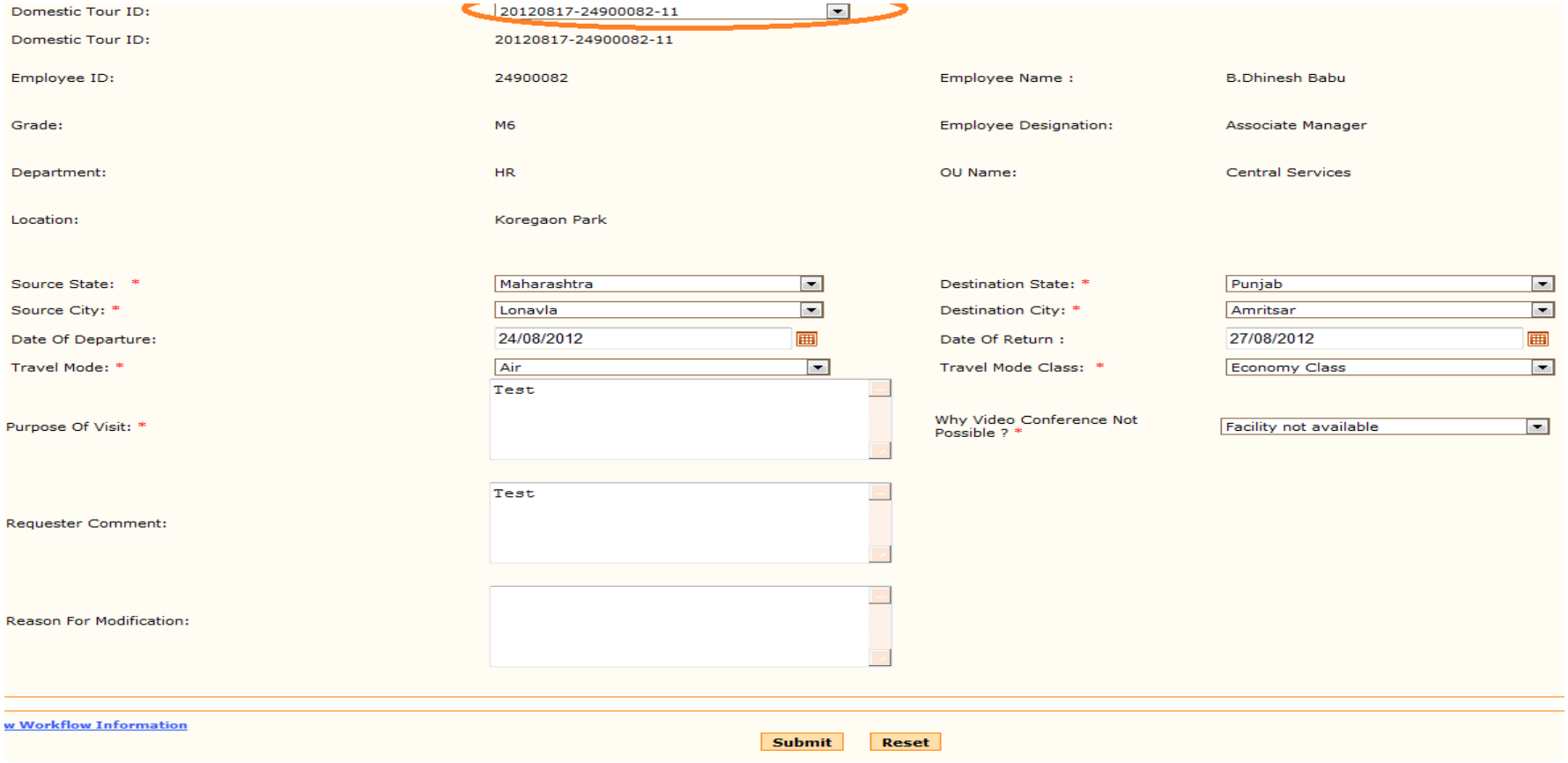
Employee ID	Employee Name	Tour ID	Amount	WorkFlow Status
24900082	B.Dhinesh Babu	20120814-24900082-2		Reject
24900082	**B.Dhinesh Babu**	**20120814-24900082-1**		**Approved**

Level No	Approver	WorkFlow Status	Submitted On
1	Piloo Wadia(24901094)	Approved	17-Aug-2012 21:01

Note:
1. Requester will get mail notification upon approval or rejection of form

Domestic Travel Request Modification

Navigation: Self Task→ Travel Management→ Domestic Travel Modification



Note:

1. Select “Tour ID” from drop down list.
2. Modify required details, enter “**Reason**” for Modification
3. Click “**Submit”** to forward the request & click “**Reset”** to refresh the form
4. An auto mail triggered to Reporting Manager for approval

Travel Modification – Approval Status Checking

Navigation: Self Task→ Travel Management→ Domestic Travel Modification

Domestic Travel Modification

Tour Request ID	Departure Date	Return Date	Source City	Destination City	Status
20120817-24900082-11	2012-08-24	2012-08-27	Lonavla	Amritsar	Reject
20120818-24900082-14	2012-08-19	2012-08-20	Mirzapur	Gangtok	Approved
20120817-24900082-4	2012-08-17	2012-08-20	Pune	Aurangabad	Approved

Navigation: Workflow forms→ forms raised by me→ Domestic Travel Modification

Form Names: Domestic Travel Modification (3)

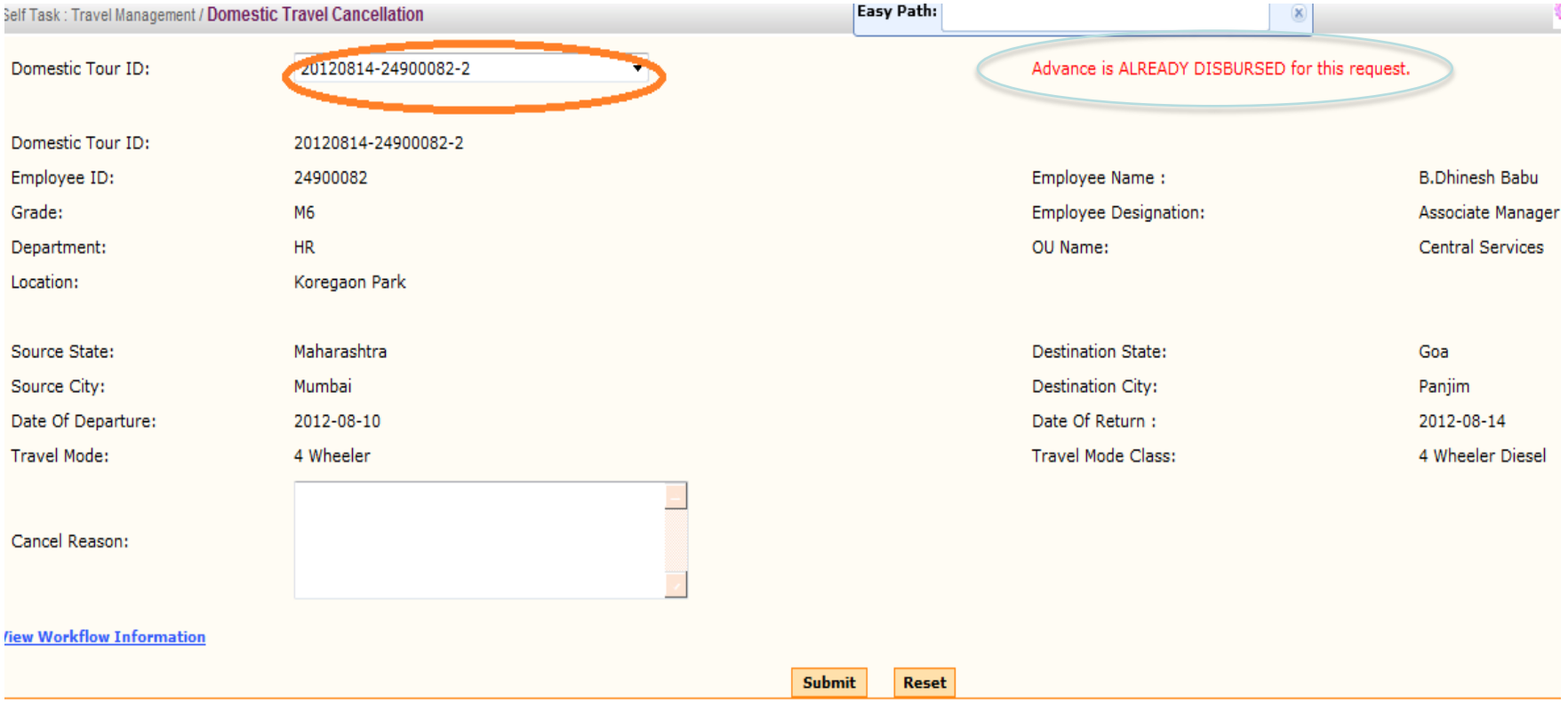
Employee ID	Employee Name	Tour ID	Departure Date	Return Date	WorkFlow Status
24900082	B.Dhinesh Babu	20120818-24900082-14	2012-08-19	2012-08-20	Approved
24900082	B.Dhinesh Babu	20120817-24900082-4	2012-08-17	2012-08-20	Approved
24900082	**B.Dhinesh Babu**	**20120817-24900082-11**	**2012-08-24**	**2012-08-27**	**Reject**

Level No	Approver	WorkFlow Status	Submitted On
1	Piloo Wadia(24901094)	Rejected	18-Aug-2012 14:27

Note:
1. Modification not allowed , if of travel date is past date
2. Mail notification triggered to Requester, upon approval/ rejection of application

Domestic Travel Cancellation

Navigation: Self Task→ Travel Management→ Domestic Travel Cancellation

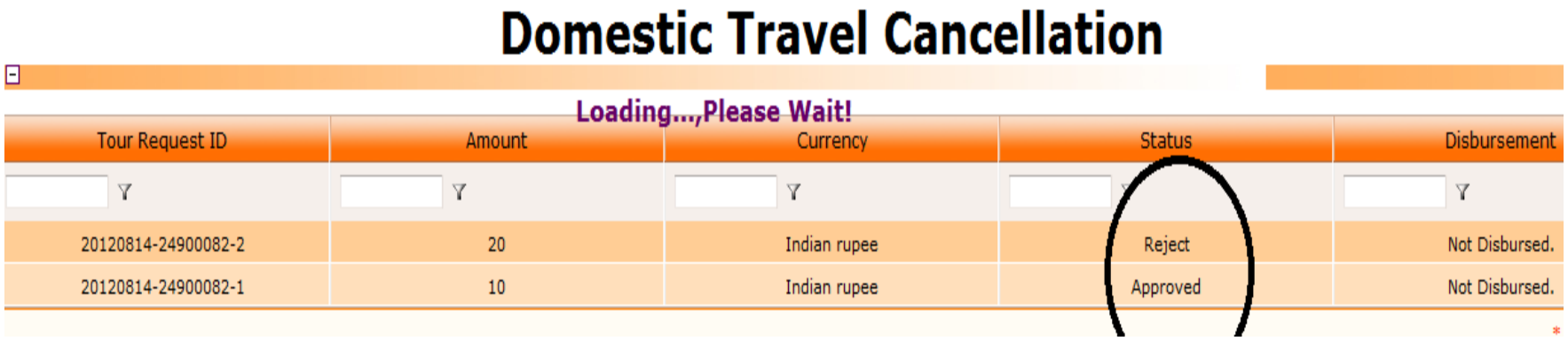


Note:

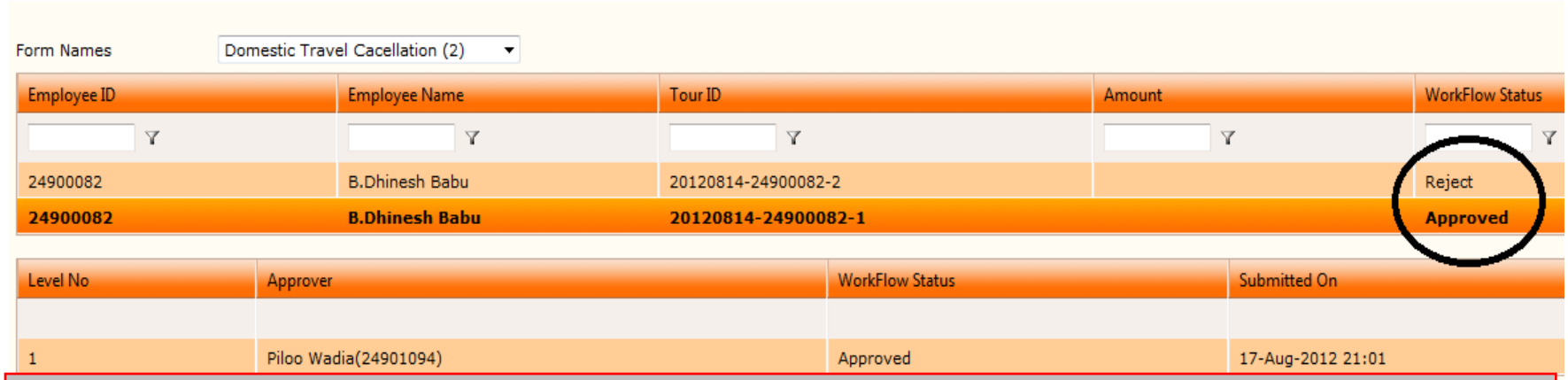
1. Select “Tour ID” from drop down list.
2. Enter “**Reason**” for cancellation
3. An alert message shown if advance already disbursed. In that case, emp. need to surrender advance amt to finance
4. Click “**Submit”** to forward the request & click “**Reset”** to refresh the form
5. An auto mail triggered to user upon approval or rejection of form by approving authority

Domestic Travel Cancellation – Status Checking …

Navigation: Self Task→ Travel Management→ Domestic Travel Cancellation



Navigation: Workflow forms→ forms raised by me→ Domestic Travel Modification

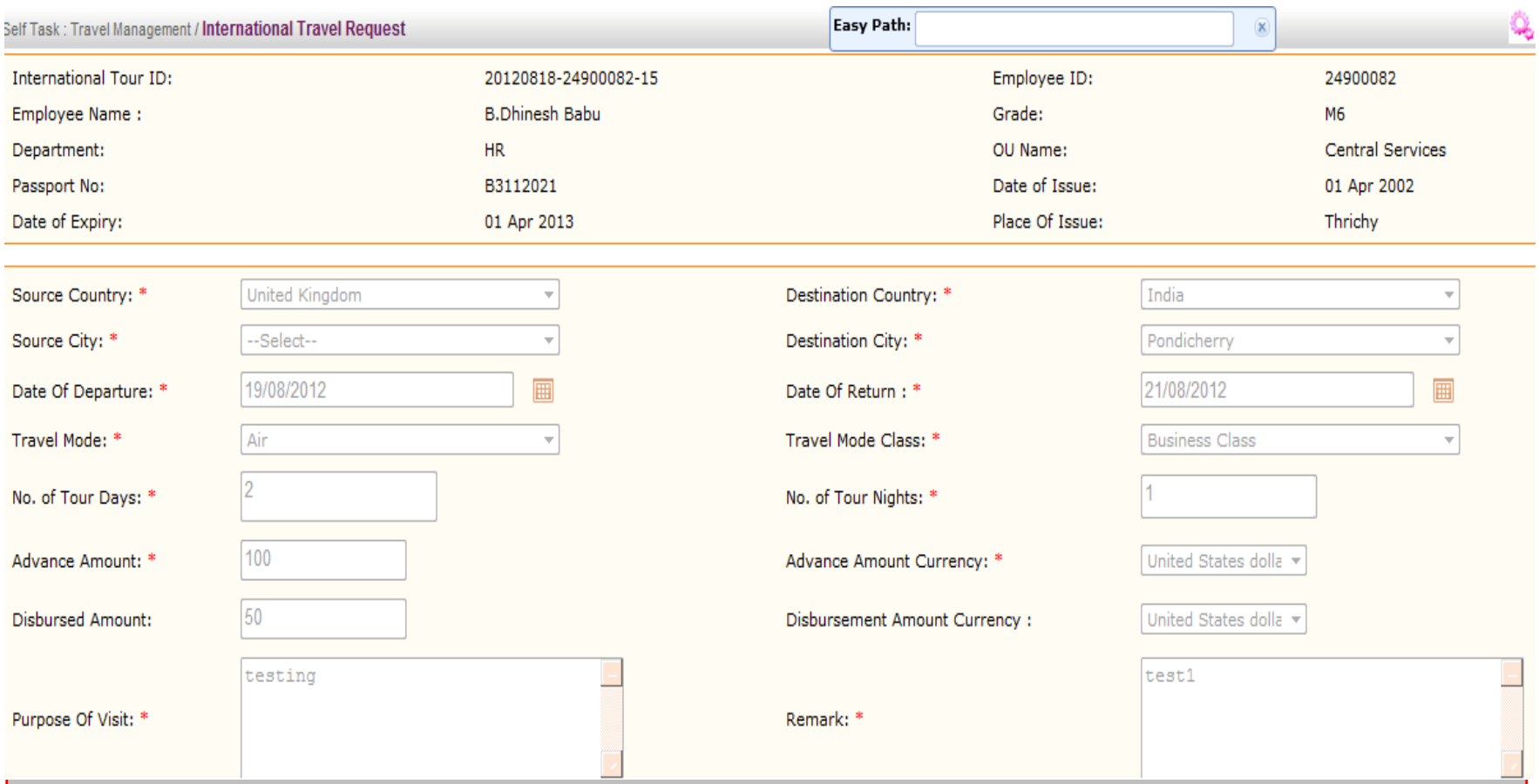


Note:
1. Travel request become inactive, if travel cancellation approved by Approving Authority
2. Travel request will be active, if travel cancellation rejected by Approving Authority

International Travel Request

International Travel Request

Navigation: Self Task→ Travel Management→ International Travel Request

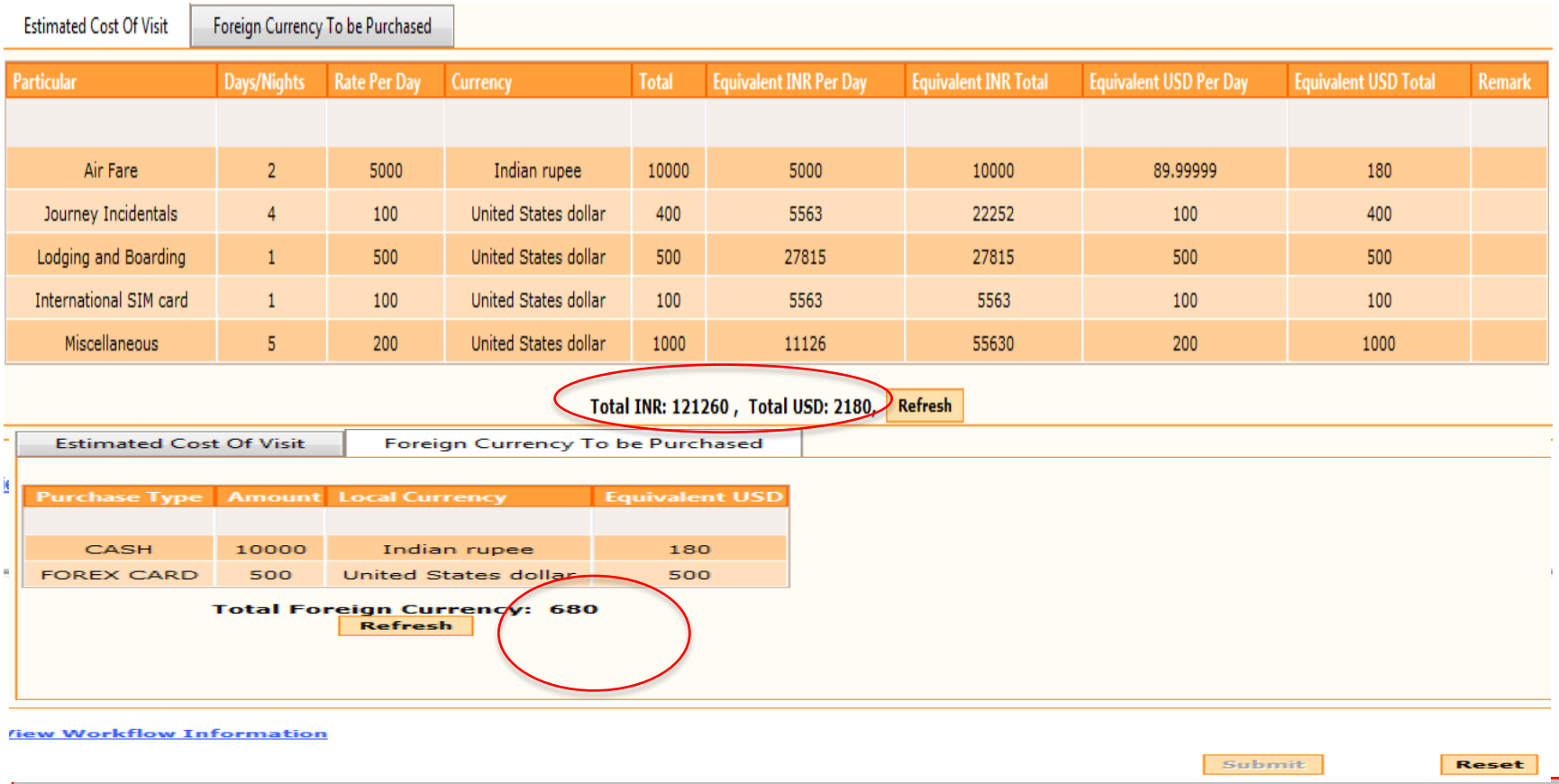

Self Task : Travel Management / International Travel Request
Easy Path:
International Tour ID: 20120818-24900082-15
Employee ID: 24900082
Employee Name : B.Dhinesh Babu
Grade: M6
Department: HR
OU Name: Central Services
Passport No: B3112021
Date of Issue: 01 Apr 2002
Date of Expiry: 01 Apr 2013
Place Of Issue: Thrichy
Source Country: * United Kingdom
Destination Country: * India
Source City: * --Select--
Destination City: * Pondicherry
Date Of Departure: * 19/08/2012
Date Of Return : * 21/08/2012
Travel Mode: * Air
Travel Mode Class: * Business Class
No. of Tour Days: * 2
No. of Tour Nights: * 1
Advance Amount: * 100
Advance Amount Currency: * United States dolla
Disbursed Amount: 50
Disbursement Amount Currency : United States dolla
Purpose Of Visit: * testing
Remark: * test1

Note:

1. Upon form selection, tour ID, Name, Code, Grade, Dept., Designation, Location & Business populated automatically
2. Select source country, destination Country, city, date of travel, travel mode and travel class
3. An alert message appears, incase your travel class entitlement is not as per policy
4. Enter advance amount required and currency

International Travel Request – Cont'd...

Navigation: Self Task→ Travel Management→ International Travel Request



Estimated Cost Of Visit | Foreign Currency To be Purchased

Particular	Days/Nights	Rate Per Day	Currency	Total	Equivalent INR Per Day	Equivalent INR Total	Equivalent USD Per Day	Equivalent USD Total	Remark
Air Fare	2	5000	Indian rupee	10000	5000	10000	89.99999	180	
Journey Incidentals	4	100	United States dollar	400	5563	22252	100	400	
Lodging and Boarding	1	500	United States dollar	500	27815	27815	500	500	
International SIM card	1	100	United States dollar	100	5563	5563	100	100	
Miscellaneous	5	200	United States dollar	1000	11126	55630	200	1000	

Total INR: 121260 , Total USD: 2180. Refresh

Estimated Cost Of Visit | Foreign Currency To be Purchased

Purchase Type	Amount	Local Currency	Equivalent USD
CASH	10000	Indian rupee	180
FOREX CARD	500	United States dollar	500

Total Foreign Currency: 680

Refresh

iew Workflow Information

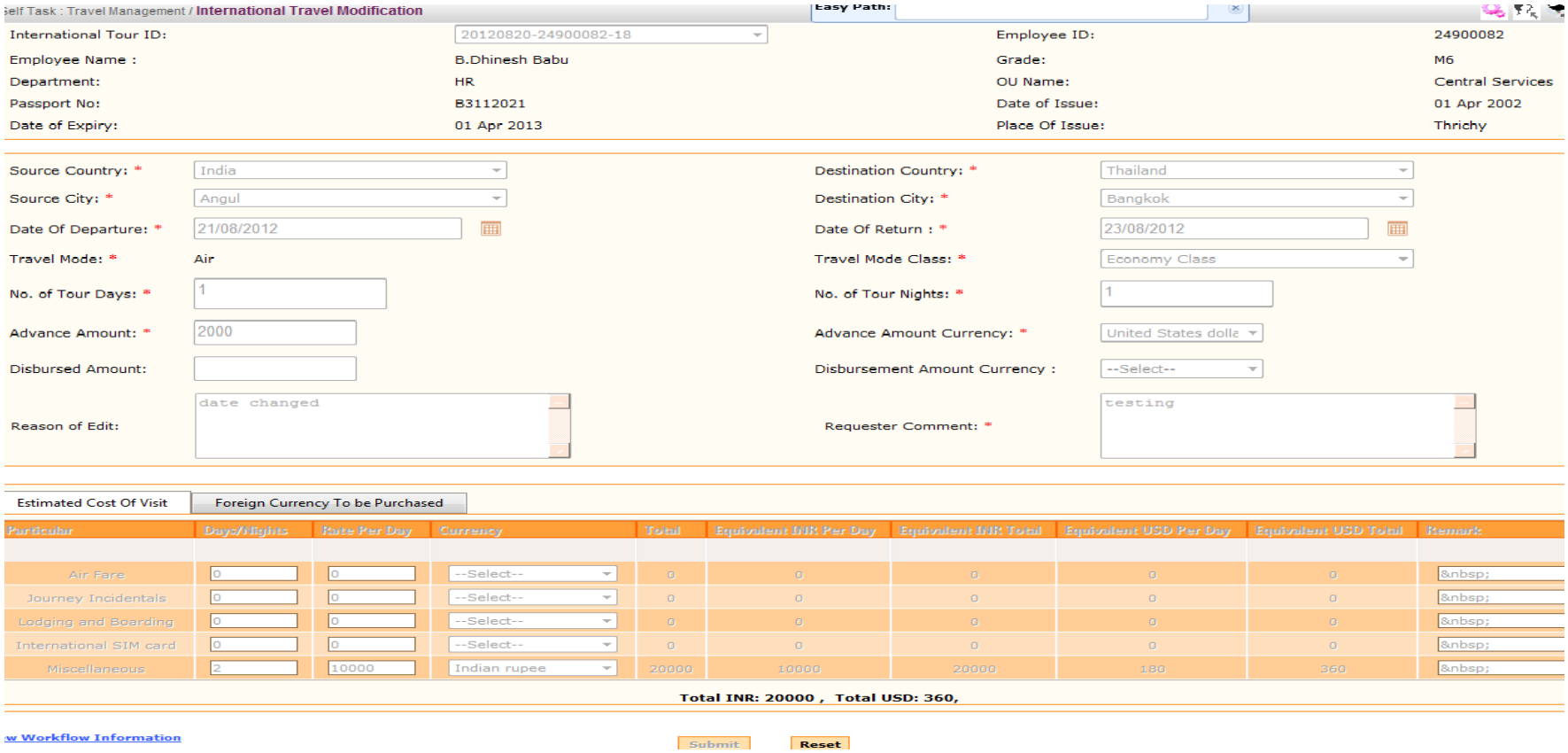
Submit Reset

Note:

1. Enter estimated expenses in each category
2. Enter Foreign currency required
3. Click "**Submit"** to forward the request & click "**Reset"** to refresh the form
4. An auto mail triggered to approver as per the workflow configuration

International Travel Modification

Navigation: Self Task→ Travel Management→ International Travel Modification

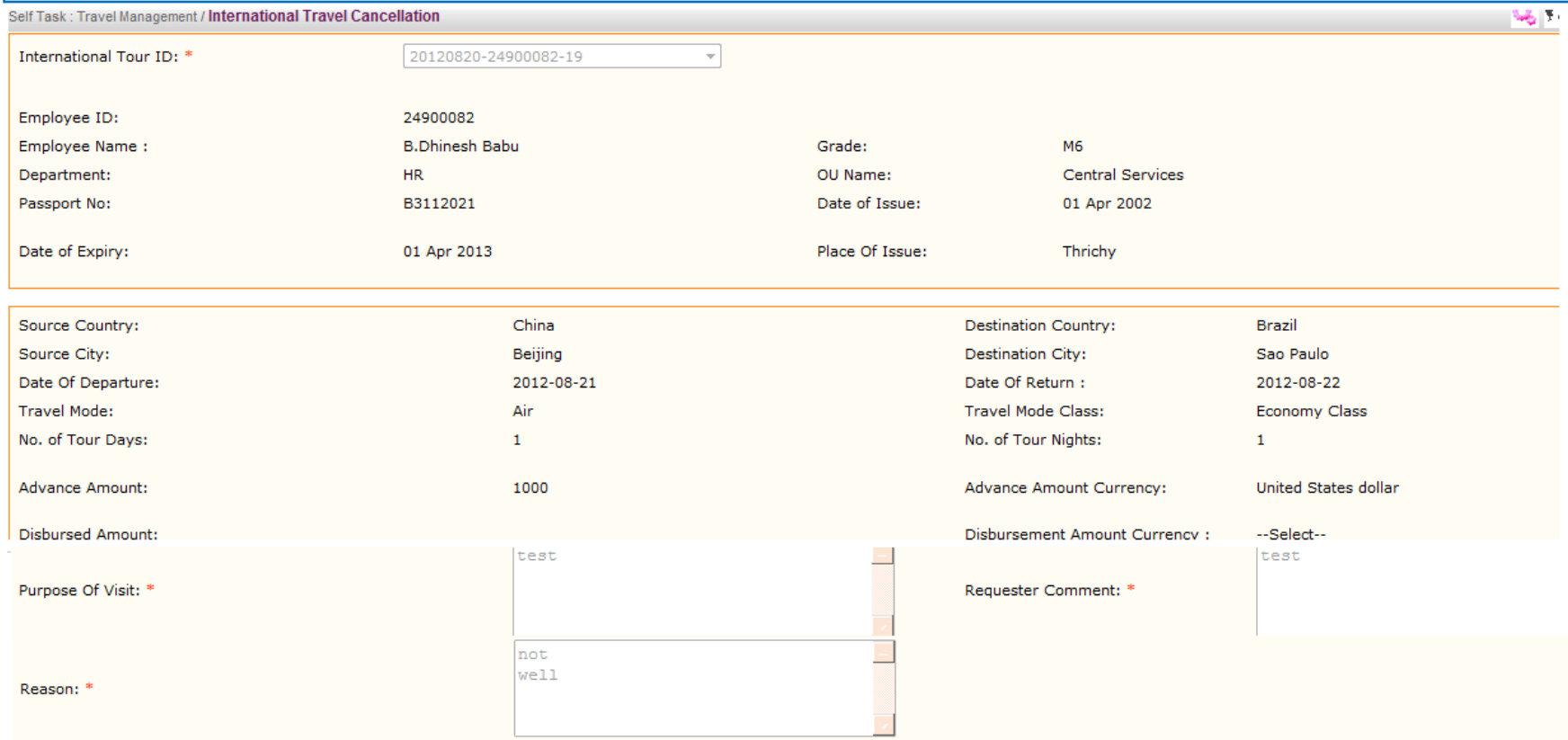

Self Task : Travel Management / International Travel Modification
Easy Path:
International Tour ID: 20120820-24900082-18
Employee ID: 24900082
Employee Name : B.Dhinesh Babu
Grade: M6
Department: HR
OU Name: Central Services
Passport No: B3112021
Date of Issue: 01 Apr 2002
Date of Expiry: 01 Apr 2013
Place Of Issue: Thrichy
Source Country: * India
Destination Country: * Thailand
Source City: * Angul
Destination City: * Bangkok
Date Of Departure: * 21/08/2012
Date Of Return : * 23/08/2012
Travel Mode: * Air
Travel Mode Class: * Economy Class
No. of Tour Days: * 1
No. of Tour Nights: * 1
Advance Amount: * 2000
Advance Amount Currency: * United States dolla
Disbursed Amount:
Disbursement Amount Currency : --Select--
Reason of Edit: date changed
Requester Comment: * testing
Estimated Cost Of Visit
Foreign Currency To be Purchased
Particular | Days/Nights | Rate Per Day | Currency | Total | Equivalent INR Per Day | Equivalent INR Total | Equivalent USD Per Day | Equivalent USD Total | Remark
Air Fare 0 0 --Select-- 0 0 0 0 0
Journey Incidentals 0 0 --Select-- 0 0 0 0 0
Lodging and Boarding 0 0 --Select-- 0 0 0 0 0
International SIM card 0 0 --Select-- 0 0 0 0 0
Miscellaneous 2 10000 Indian rupee 20000 10000 20000 180 360
Total INR: 20000 , Total USD: 360,
w Workflow Information
Submit
Reset

Note:

1. Select “Tour ID” from drop down list.
2. Enter required details which are need to be modified , enter “**Reason**” for Modification
3. Click “**Submit”** to forward the request & click “**Reset”** to refresh the form
4. An auto mail triggered to Approving Authority as per workflow configuration

International Travel Cancellation

Navigation: Self Task→ Travel Management→ International Travel Cancellation



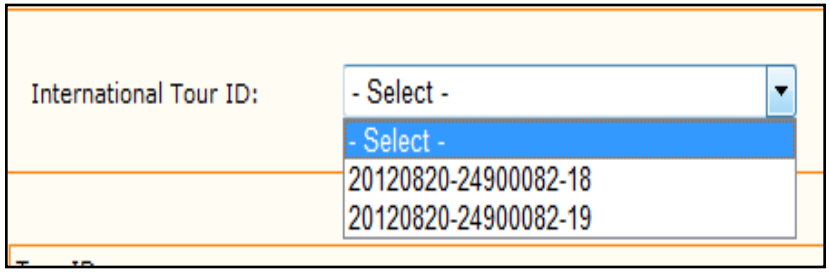
Note:

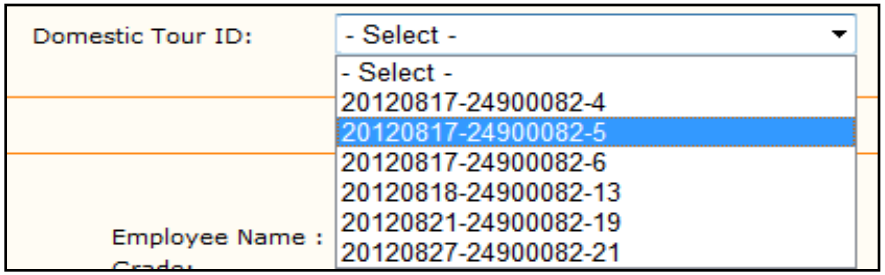
1. Select “Tour ID” from drop down list.
2. Enter “**Reason**” for cancellation
3. An alert message shown if advance already disbursed. In that case, emp. need to surrender advance amt to finance
4. Click “**Submit”** to forward the request & click “**Reset”** to refresh the form
5. An auto mail triggered to user upon approval or rejection of form by approving authority

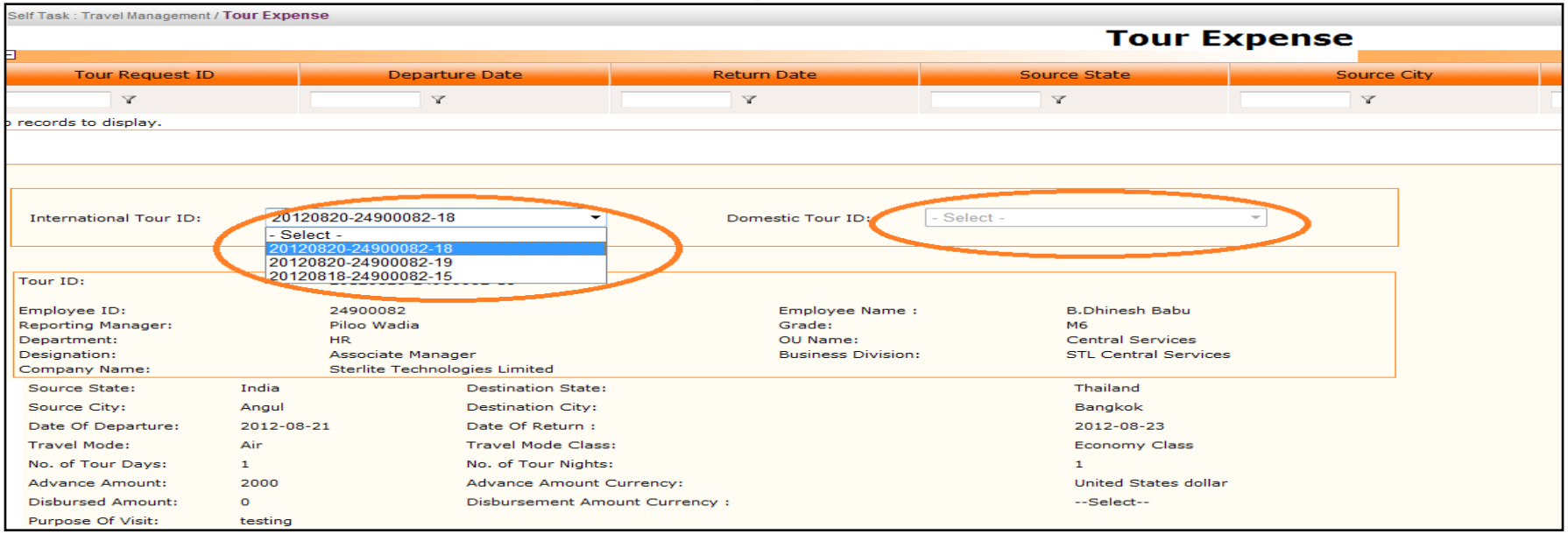
Travel Expense Reimbursement

Travel Expense Reimbursement

Navigation: Self Task→ Travel Management→ Tour Expenses



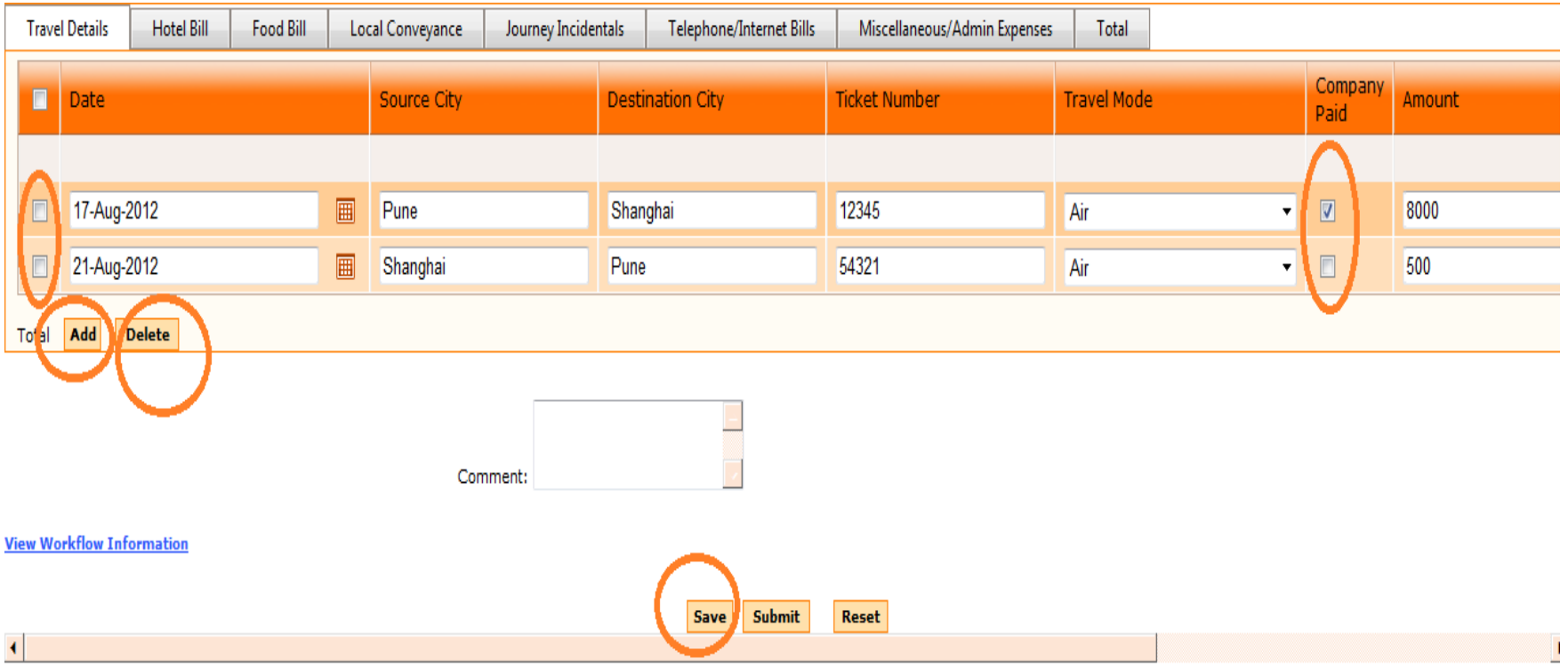




Note:

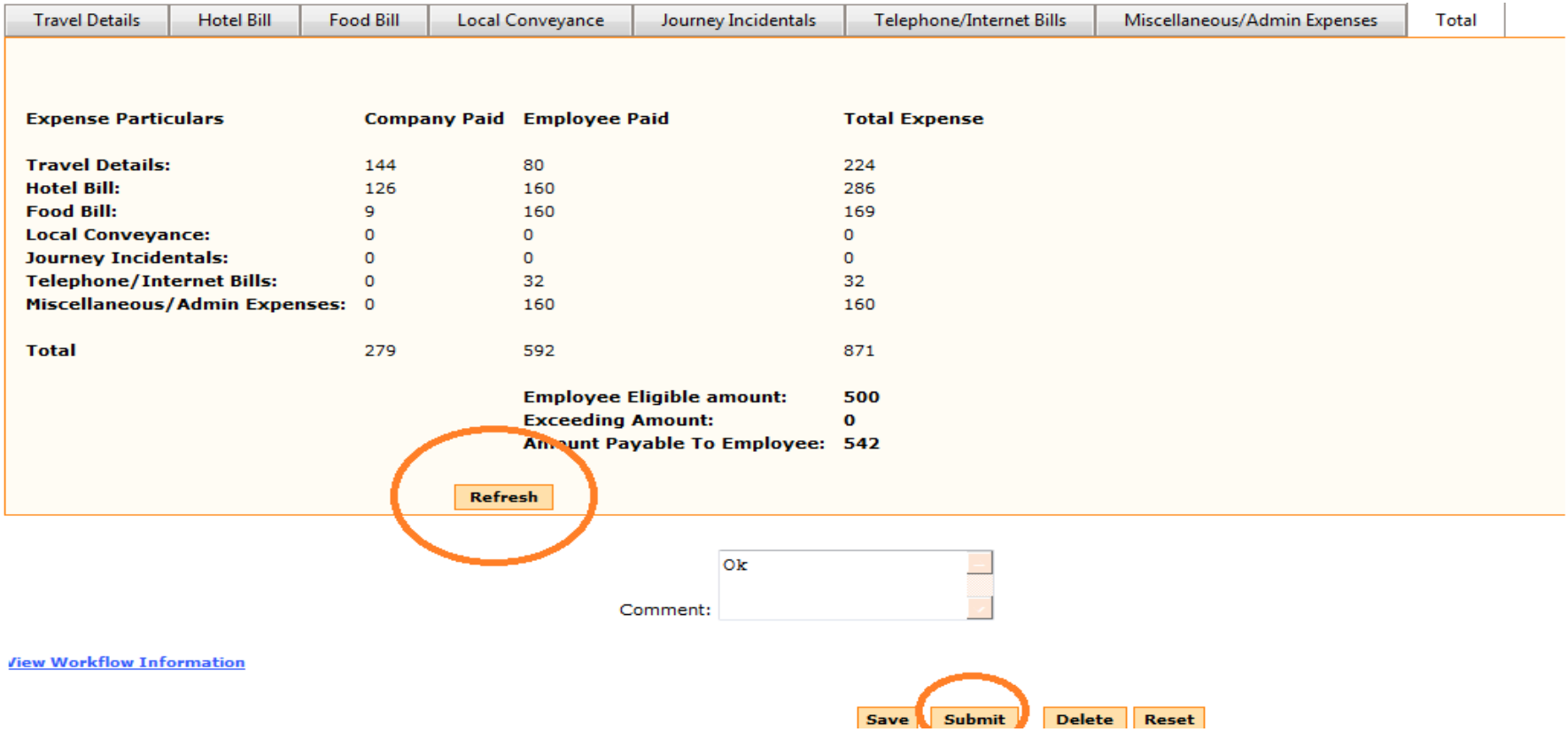
1. Select “Tour ID” from drop down list
2. On selecting a Travel Request, details such as Source City, End City, Travel Start Date, Travel End Date, Advance amount taken etc are populated in the form.

Travel Expense Reimbursement – Cont'd...



Note:
1. Select date when the expense has incurred, enter Source City, Destination City, Ticket No. Travel Mode, actual expense amount, currency in which expense incurred
2. Click on check box, if expenses paid by company directly else uncheck company paid
3. Click **"Add"** to add more row to fill expenses
4. You can not add new row till the previous row is not filled
5. To delete any row, select the row by clicking the checkbox and click "**Delete"**
6. Enter all expenses transactions where ever applicable (Hotel, Food, Local Conv., Journey Incid., miscellaneous)
7. Click **"Save**" to save details

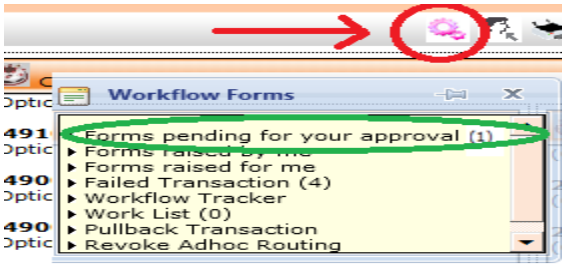
Travel Expense Reimbursement – Cont'd…

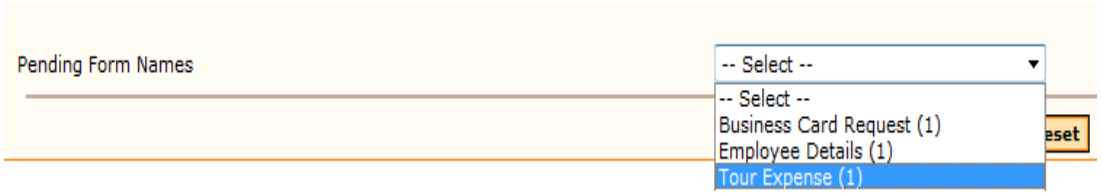


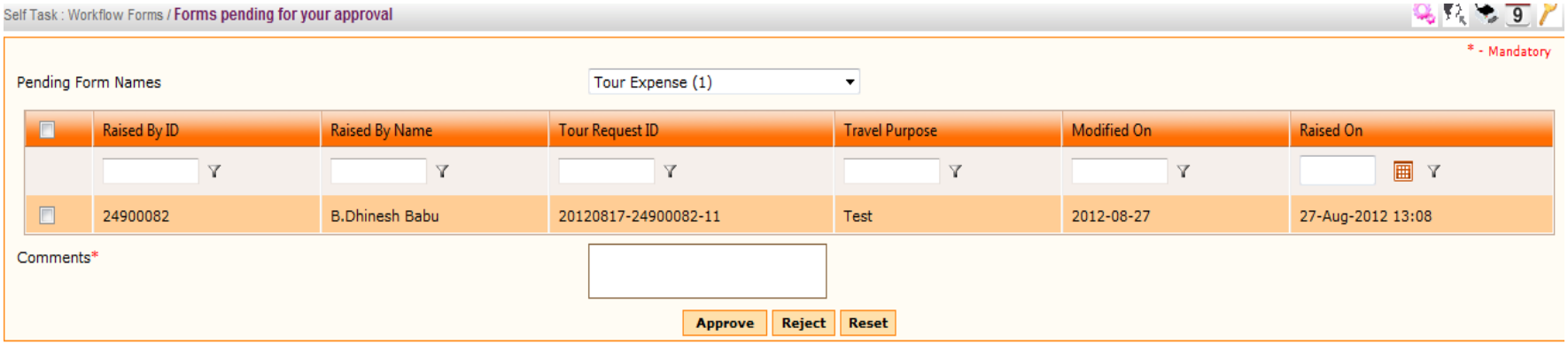
Note:
1. Click "**refresh**" to see category wise total expenses
2. Domestic tour expenses calculated in local currency and International Tour expenses calculated in USD
3. Employee can view Company paid amount, Employee paid amount, Total expenses, Employee Eligibility as per claim policy, Amount exceeded and amount payable or receivable
4. Enter comment and click "**submit**" to forward the form for approval
5. Click "**reset**" to refresh the page
6. Auto mail triggered to Reporting Authority as per role mapping

Travel Expense Reimbursement Approval

Navigation: Workflow forms→ Form Pending for approval / Self Task forms pending for approval



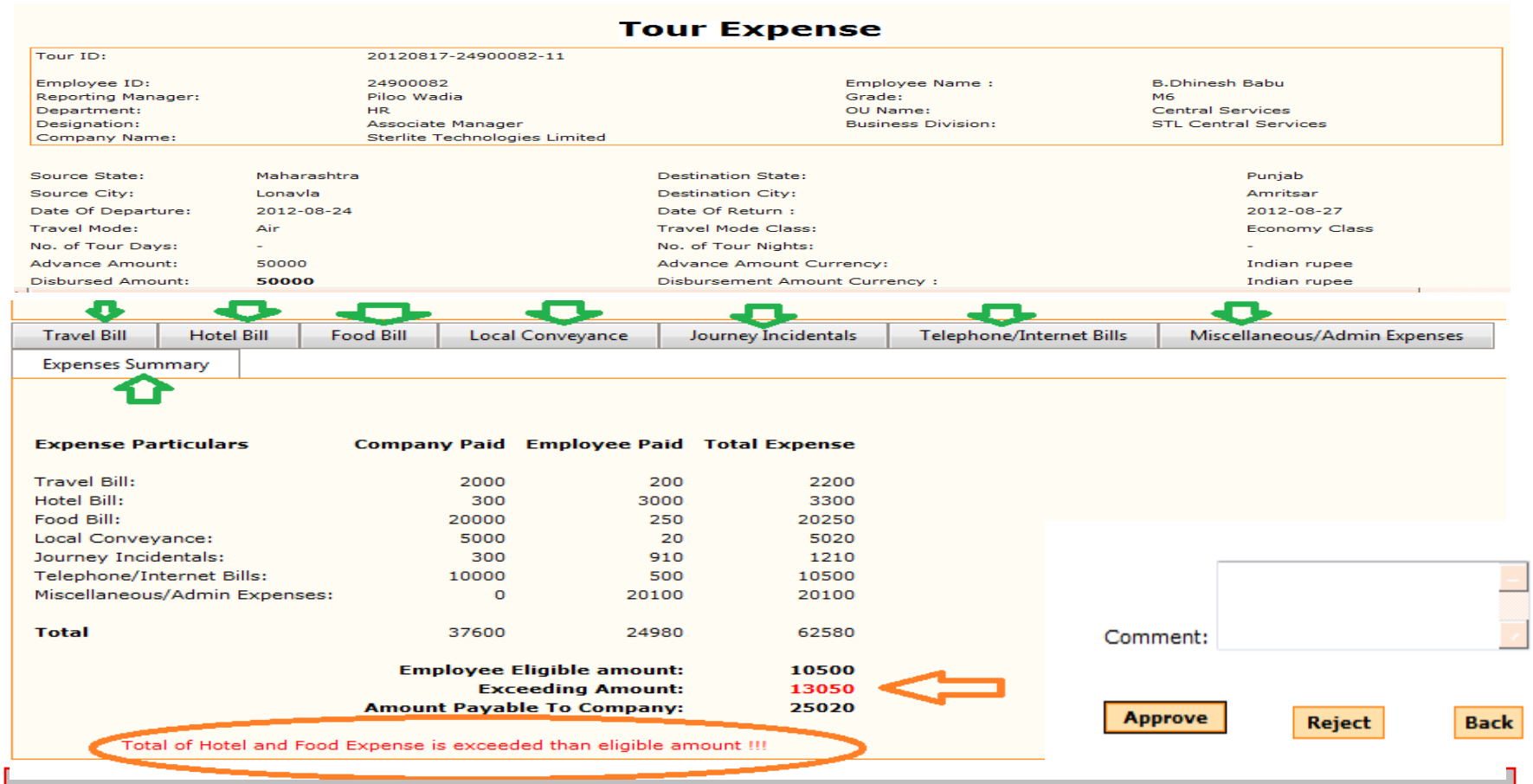




Note:

1. Only the approvers who have been configured in the workflow will be able to approve the travel requests that are raised by the initiator
2. Approver may click on the link which is enclosed on mail notification and logon directly to the application page
3. Select '**Forms pending for your approval**' from the Workflow forms popup window, and select '**Domestic Travel Request**' from the Pending Forms List
4. On selecting the form name, the list of requests that are waiting for approval will be open as shown above.
5. Choose a record to approve / reject
6. Double click on the record will open the request details as shown in next slide

Travel Expense Reim. Approval –cont'd...



Tour Expense

Tour ID:	20120817-24900082-11		
Employee ID:	24900082	Employee Name :	B.Dhinesh Babu
Reporting Manager:	Piloo Wadia	Grade:	M6
Department:	HR	OU Name:	Central Services
Designation:	Associate Manager	Business Division:	STL Central Services
Company Name:	Sterlite Technologies Limited		

Source State:	Maharashtra	Destination State:	Punjab
Source City:	Lonavla	Destination City:	Amritsar
Date Of Departure:	2012-08-24	Date Of Return :	2012-08-27
Travel Mode:	Air	Travel Mode Class:	Economy Class
No. of Tour Days:	-	No. of Tour Nights:	-
Advance Amount:	50000	Advance Amount Currency:	Indian rupee
Disbursed Amount:	**50000**	Disbursement Amount Currency :	Indian rupee

Travel Bill | Hotel Bill | Food Bill | Local Conveyance | Journey Incidentals | Telephone/Internet Bills | Miscellaneous/Admin Expenses

Expenses Summary

Expense Particulars	Company Paid	Employee Paid	Total Expense
Travel Bill:	2000	200	2200
Hotel Bill:	300	3000	3300
Food Bill:	20000	250	20250
Local Conveyance:	5000	20	5020
Journey Incidentals:	300	910	1210
Telephone/Internet Bills:	10000	500	10500
Miscellaneous/Admin Expenses:	0	20100	20100
Total	37600	24980	62580

Employee Eligible amount: 10500
Exceeding Amount: 13050
Amount Payable To Company: 25020

Total of Hotel and Food Expense is exceeded than eligible amount !!!

Comment:

Approve | Reject | Back

Note:

1. Approver can able view tour details, heading wise expenses details, Expenses Summary, Employee Eligible amount for Lodging & boarding, Exceeded amount if any..
2. Enter Comments and click "**Approve"** to approve / Click "**Reject"** to reject the form
3. If claim amount exceeds from the eligibility limit, then the application forwarded to Business Head / Functional Head for deviation approval
4. An auto mail triggered to Requester as well as Approver upon approval / rejection of form

Travel Expense Reimbursement – Approval Status checking…

Navigation: Self Task→ Travel Management→ Tour Expenses

Tour Expense

Return Date	Source State	Source City	Destination State	Destination City	Status
2012-08-21	United Kingdom	Milton Keynes	India	Pondicherry	Reject
2012-08-14	Maharashtra	Mumbai	Goa	Panjim	Approved

Navigation: Workflow forms→ forms raised by me→ Tour Expenses

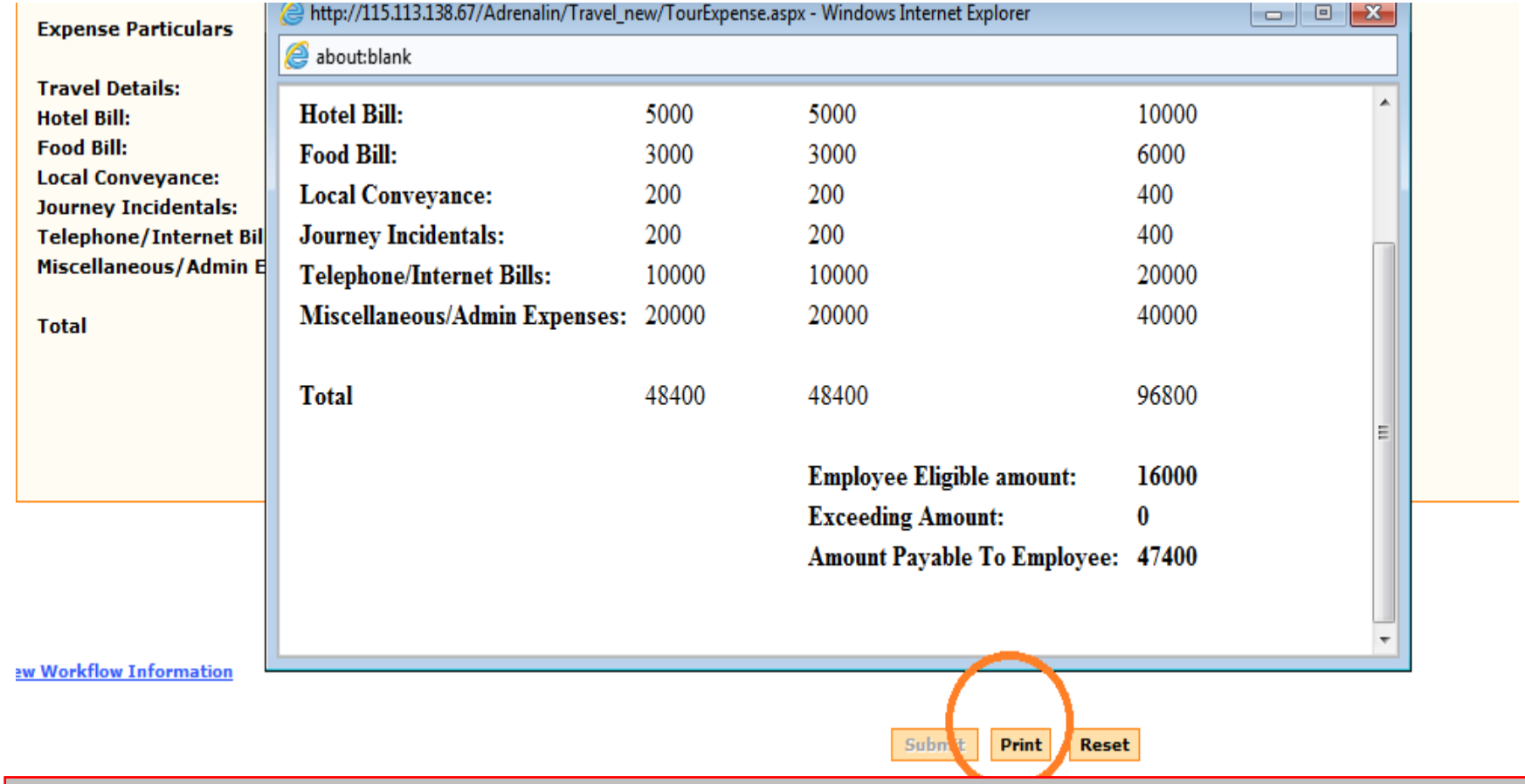
Form Names: Tour Expense (2)

Employee ID	Employee Name	Tour ID	Departure Date	Return Date	WorkFlow Status
24900082	B.Dhinesh Babu	20120818-24900082-15	2012-08-19	2012-08-21	Reject
24900082	**B.Dhinesh Babu**	**20120814-24900082-2**	**2012-08-10**	**2012-08-14**	**Approved**

Level No	Approver	WorkFlow Status	Submitted On
1	Piloo Wadia(24901094)	Approved	22-Aug-2012 16:34

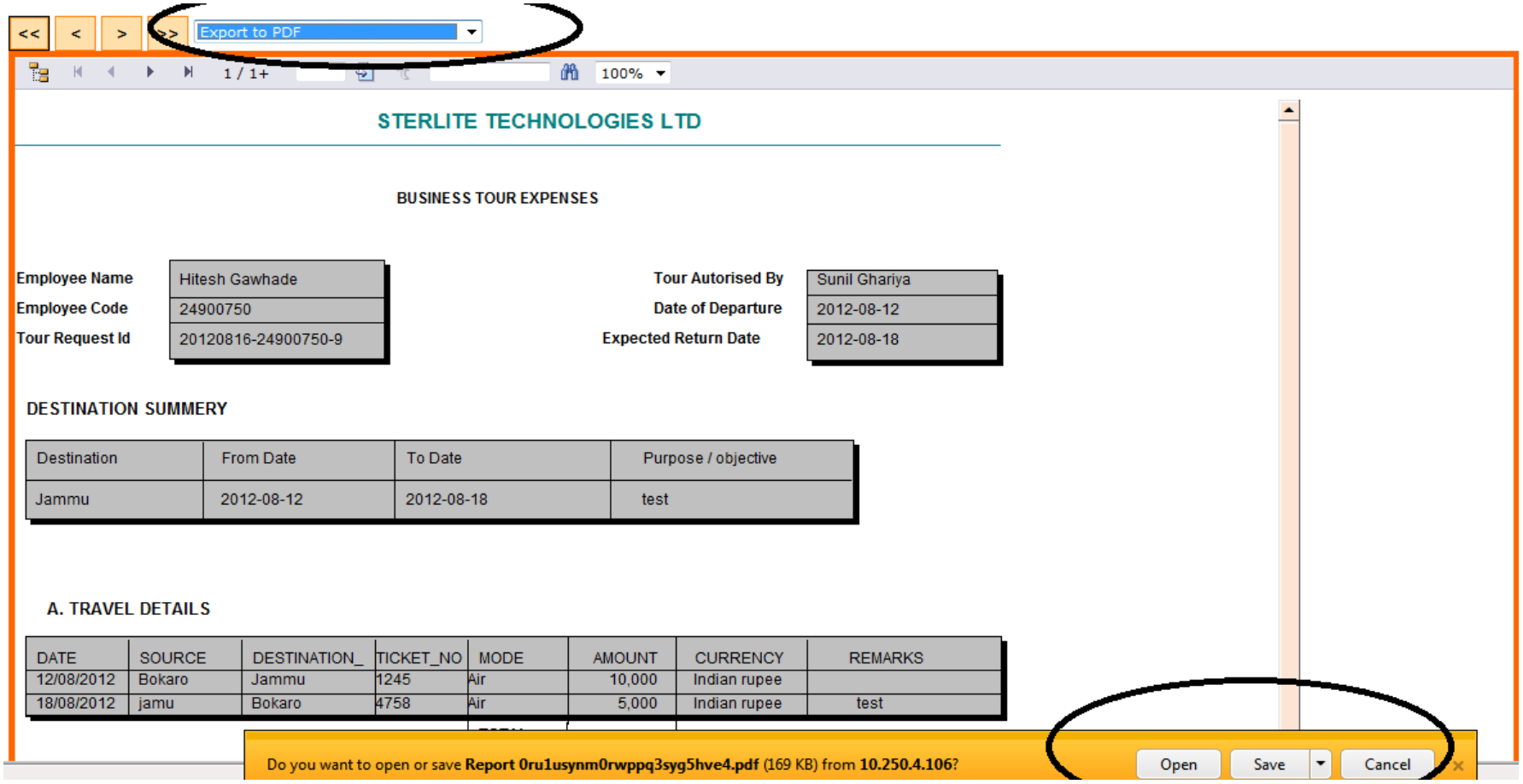
Note:
1. Mail notification triggered to Requester, upon approval/ rejection of application

Expense Reimbursement – Print



Note:
1. “Print” option will be active once the expenses form approved from approving authority
2. Click “Print” to take print out of expenses form

Expense Reimbursement – Print



Note:
1. Export to PDF & take print
2. Attach all supporting documents and send to Finance for verification and final disbursement

Points to Remember

1. Travel mode & expenses entitlements limits configured as per Domestic & International Travel Policy
2. Travel request should be raised for future date only. Back dated travel requests not allowed
3. You can able fill Travel Advance Request for Domestic Travel, only after Domestic travel request approval
4. No separate Advance Request for International travel, the same is part of the travel request form itself – since this is part of the approval process.
5. Incase of withdrawal,
   - Use Pullback option to cancel unapproved applications
   - Use Cancellation form, if applications are already approved by approving authority
6. Cancellation/Modifications are allowed only after the travel request approved from approving authority
7. Travel Details can not be modified/cancelled once the travel date is over
8. If travel modification request is rejected by approving authority – then the travel request becomes active as per original itinerary
9. If travel cancellation request is rejected by approving authority – then the travel request becomes active
10 Click “save” to avoid data loss while filling expenses form – note you can start filling details into expense form as soon as travel start date commences
11 Expenses amount need to filled & calculated in local currency if travel is domestic
12 Expenses amount need to filled & calculated in USD, if travel is international
13. Print button becomes active, only after expense are approved by respective approving authority
14. Hard copy of expenses form **necessarily need to be submitted** to Finance along with all supporting documents – for finance to reimburse the same

Thank You

Connecting every home on the planet